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# Improving the Conference Coordinating Process: Case company X

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## **Improving the Conference Coordinating Process: Case company XX**

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Event management plays a vital role in providing development opportunities needed in the everchanging environment we live in today. Therefore, it's important to have an efficient and effective event planning process that can be standardised through the company to fulfil all the different event requirements.

This thesis will closely define and analyse the conference planning process used by the conference coordinators of company X. Conferences and events play a large role in employee development of the company. Therefore, it is important to provide these development opportunities throughout the year and to ensure the process is as efficient and up to date as possible. This thesis can be used as an event manual to standardise the event planning process throughout the company.

Background knowledge is gathered on the conference coordinating process through previous case studies and literature reviews. The objective of this thesis is to analyse the conference coordinating process used by company X and define all the pain points within the process that could be improved. The goal of the thesis is to define possible weaknesses within the current conference coordinating process and to gather improvement ideas using qualitative and quantitative methods.

The quantitative data is used to confirm the hypotheses and provide a base for the research purpose. The data is gathered from analysing participant feedback from the conference X, one of the largest employee development conferences organized annually. Quantitative research is then used to find possible improvement ideas to the pain points found within the conference planning process. The data is gathered through interviews from internal as well as external event planners. Data is then analysed using theme analysis.

The main result of this thesis will be to provide company X with a clear overview of all pain points within their conference coordinating process. Through collecting data, the author can provide solutions and improvements to some or all the process pain points. Previous conference surveys were used to define the participant satisfaction rate in the process. The conference X is an internal professional development conference that is compulsory for client facing employees. The large number of participants provides a broad and detailed data on the participant satisfaction rate. The author could benchmark conference survey data back to 2014, allowing a complete thorough longitudinal data analysis.

Lastly, the author defines the different improvement ideas in the thesis conclusion. This section contains the recommendations the author has gathered that the company could implement. The author will then define why these improvement ideas were chosen.

**Keywords:** conference, coordinating, planning, process, pain points, improvement

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## 1 Introduction

This thesis started from an internship I was completing for company X as a Meeting and Conference Coordinator. During my internship, I have worked through the company conference coordinating process for several different events and have defined some main pain points within the process. This led to me discussing the process with my managers and finding that they have defined the same weaknesses within the planning process. Due to this discovery, I decided to conduct a case study on the conference planning process at company X.

### 1.1 Thesis Background

Humans are social beings, needing communication and opportunities to meet people face-to-face. We communicate best when we are in the same room with another person. With the development of new technologies, like telephones or more high-tech methods, we can now continue our conversations without leaving the office or even home. Though many companies are now leaning towards increasing electronic communication, people still value opportunities to connect face-to-face to exchange ideas. There are also other things that we enjoy coming together for, for example sports events, celebrations, commemorations or conferences.

Bringing people together is not always the easiest task and can sometimes be a complex undertaking. Especially trying to gather large numbers of people with different expectations of the amenities they will enjoy or diverse agendas is always a challenge. As a result, an industry was developed to facilitate different kinds of events. The professionals that manage this large variety of different events are known as meeting, conference, and event planners. The main tasks for an event planner include selecting the location of the event, making transportation arrangements, booking accommodations, ordering catering, and handle numerous other details. Before the planning commences, the event planner agrees on the event budget, theme and purpose with the client. They are also responsible for inspecting facilities, arranging staff and negotiating with service providers. During the event, the event planner monitors the different activities to make sure the event is running smoothly.

#### 1.1.1 Who is company X

Company X was founded in 1969. The company's business imperative is to enhance their clients' financial well-being throughout their life. The company's expert employees offer objective advice, financial planning and solutions aimed for the specific needs of their clients. Supported by more than 45 years of experience, the employees are trained to provide comprehensive financial plans, advice and solutions for their clients from school all the way to retirement. The company places special importance in training their employees to be able to provide the most modern practices and effective financial services to their clients.

The employees work on salary instead of commission. Without the incentive to sell products, the employees are sure to provide advice that is to the clients' best interest. The company prioritizes clients meeting their financial goals above maximizing corporate profits.

Company X has offices all around Canada, the main headquarters being in Ottawa, Ontario. Since the company has employees all around Canada, they need to make sure all their client facing employees provide the same level of service to their clients. This can also be ensured by arranging conferences and training opportunities where all the client facing employees are gathered together to exchange knowledge and skills.

#### 1.1.2 Company X and Events

In the beginning, all company X events were team based. Each team managed their own internal events without any real structure. The company's internal events are linked to the company core values, which are service excellence, team work and integrity. As the company grew, each team developed their own structure and way of executing events. The focus became to promote team work, gather likeminded people and bring everyone together to learn. Nowadays all internal events have this as their main purpose. This has been the main promoter for sharing knowledge and learning from one another throughout the company. The focus has also allowed the company to ensure its main values to put clients first is consistent throughout Canada. The main internal events that company X arranges are professional development events such as the conference X, Specialist Conferences, Professional Development Days and leadership meetings.

Arranging trainings and conferences has proven to be the best way for the company to make sure client needs and expectations are met. By providing opportunities where best practices can be shared and new updates to the physician field are provided, the advisors are always up to date and providing the best possible services to their clients. The internal events also allow for new methods to be developed that will bring value to clients.

External events are also managed by teams that work together to serve clients. All employees work together communicating openly and respecting each other's' expertise and ideas. This promotes a very positive team environment that is key to executing a successful event. Each team member is coached, trained and encouraged throughout the process and take full accountability for their contribution to the team.

The external events that the company arranges are focused on providing clients with information on the services company X provides. The company ensures sales by informing physicians about their professional capabilities to understand clients best, provide them with consistent services and promote the gathered expertise made possible by consistent training and experience. The main types of external events that the company arranges include seminars,

family days, position recognition days, investment focused seminars, webinars as well as different types of university events.

The company has always been arranging internal professional development events. External events were used to gather clients and continue the company's growth. Events were scattered around different departments. In 2013, the function was moved to Procurement. The internal events were mostly small meetings with less than 10 participants, larger professional development conferences, as well as seminars and department offsite meetings. The Meeting and Conference Coordinating team took over the management of most internal company X events, including the conference X. All internal events have had their own purpose and added to the company's value and growth.

This thesis will be focused on the process executed to coordinate an internal professional development event. The thesis will look closely into the planning and coordinating process of the 2018 conference X. This conference is arranged annually with an objective to provide training opportunities, networking as well as recognition to participants.

### 1.1.3 The conference X

The conference X was originally known as a Financial Consultant conference. The conference was held in smaller cities for example, Charlottetown, Calgary, Whistler and Victoria. The name 'conference X' developed when other lines of business were added to participate. The first conference X was held in 2000. It is a large scale internal professional development event arranged annually by the Meeting and Conference Coordinators with the help of a broad team of professionals. The conference gathers around 600 employees together every year from all around Canada to take part in a three-day training and development event. The main theme and objective of the conference is to ensure service excellence, team work and integrity. Every year the conference coordinating team receives certain areas of the company X values to focus the materials and training on, that then give each conference a main purpose.

Participants leave the event with new skills, a new mind set, fresh idea and more knowledge on how to ensure their clients' needs are met. The conference is a way to create new networks and have the employees connect and exchange knowledge with those who may work on opposite sides of the country. Therefore, it is important that the coordinating process of the conference X is efficient and standardised. The conference now due to its large participant amount has been held in Ottawa, Montreal or Toronto.

## 1.2 Purpose

The main purpose of this thesis is to analyse the company X conference coordinating process and to define all the pain points. This will allow for a better understanding of the main areas



in the process that could be improved. The next step will to then benchmark different improvement recommendations through interviews and secondary questionnaire analysis with other conference coordinating companies and conference coordinators.

The main aim of the thesis is to find weaknesses within the conference planning process and to define possible improvement opportunities. Once the analysis and hypothesis have been completed, this thesis can be used as an internal event planning manual for standardising the internal event coordinating process throughout the case company.

The main goal of my thesis is to define the conference planning process used to coordinate the annual conference X and conduct a thorough analysis on the process. This will be useful to the company to be able to standardize the practice and ensure an efficient modernized process. The aim is to gather information from different specialists in the conference planning field as well as best practices and to be able to propose improvements to reach the thesis goal. The main outcome that is expected, is to define the problem areas in the planning process and to gather different improvement proposals for the problems through benchmarking. The possible research problems that are expected to be found are that the conference coordinating process is too manual, there is a lack in improvement ideas and the process is inconsistent throughout conferences and throughout the company. There are many areas of the process that could be done more easily using different programs or standardising templates etc. Finding these steps could be the key to make the conference planning process more efficient.

The main research question that forms the basis for this study is:

*What are the pain points in the conference coordinating process used by case company X Conference Coordinators?*

To thoroughly explore this idea, the author developed the following supporting sub questions. Through thoroughly investigating the sub questions, the in-depth exploration of the main research question can be made. This detailed approach will support and direct the author to come to a more accurate and desired outcome.

- What is the main conference coordinating process used by the conference coordinating team?
- How satisfied are the participants in the conferences that company X organizes?
- What sections of the process have proven to be most difficult to the coordinators?

According to the information gathered to answer the main research question, the next step in this research study is to define:

*Does the conference planning process have areas to improve? What are possible improvements that the company could implement into their conference coordinating process?*

This section of the study will be answered using qualitative and quantitative research methods. To explore this idea more thoroughly, the following sub questions were developed:

- Why is event management so important?
- What process do other event coordinators use?
- Are there areas requiring improvement according to the quantitative data?

### 1.3 Thesis framework

The structure of the thesis is constructed starting with the knowledge base. This section will look more closely into the main terminology and importance of coordinating successful events. Next, the process that company X uses to coordinate a conference will be defined and analysed. This will lead to the main pain points being defined and the study methods being put into action. The qualitative and qualitative research will then be analysed. According to the observations, the main hypothesis and suggestions for the company are defined. The result of the thesis can be used as a guide for company X conference coordinators to execute a successful conference.

## 2 Methodology

To find the most suitable method for reaching my objectives, I chose to use both qualitative and quantitative research. This is because I wanted to have thorough database to analyze and define relationships between different aspects in the conference coordinating process. My aim for the quantitative research is to prove my hypothesis is correct and define some relationships between certain variables. The best type of research to help prove hypotheses is experimental research. To define relationships between certain variables I would need to use also correlation analysis. To create my data base, I decided to gather conference X survey results from 2014-2018 to ensure I have a very thorough base to analyze. I will analyze the data found using a mixture of experimental and correlation data analysis. This will allow for me to prove my hypothesis of there being areas in the conference planning process still requiring improvement. The results will also be able to back my whole purpose for this study if my hypothesis is proven correct.

For the qualitative research, I have been considering using either field observation or themed interviews to gather my data. The best way to achieve improvement ideas though would be through conducting themed interviews. Field observation would require a longer period to

achieve results and observations that would prove helpful to the purpose of my thesis. Therefore, I decided to use themed interviews to gather my data. The overall theme of my research is to identify improvement ideas for the conference planning process. Thus, I plan to divide the main pain points found in my analysis to be captured in my interview questions. I will need to divide the overall theme into smaller sections. I divided my themes into personal details, participants, planning committee, communication, managing tasks, programs/software, managing lists, satisfaction surveys and event industry. All of these themes included a pain point I wished to gather improvement ideas for. I then used theme analysis to gather improvement ideas into my conclusion.

The data for this thesis was gathered through mix methods. The qualitative data will produce primary data that has not existed before. The target for the interviews are experienced conference coordinating professionals. Secondary quantitative research will be gathered and analysed from the conference participant satisfaction surveys from previous years. The data is hoped to be linked to pain points within the process and relationships defined. This could then increase the study reliability, by confirming the overall hypothesis and purpose for the thesis.

In the interviews, different event planners within the company as well as external event planners will be questioned, allowing for diverse data to be gathered. To gather enough information for the study to be reliable and produce recommendation ideas for the company, 4 internal event planners with different processes and 3 external event planners will be interviewed. The questions for the interview have been developed from themes, making it easier to conduct a theme analysis.

For the secondary quantitative data, conference X survey results were analysed going back to 2014. This created an understanding of how the participant satisfaction levels have developed from 2014 -2018. The results can then be used to confirm the hypothesis.

### 3 Introduction to event management

Nowadays, event management is a universal word in. The word can be used to describe large corporate meetings, small-scale dinners, or event international sport events like the Olympics. Management is a very known field, but what exactly is an event? (Damm, S. 2012)

Events have been around forever and the word “event” originally came from the Latin word “eventus”. In those days it was only used to describe large happenings that were out of the ordinary. Nowadays, the word event is used for any social gathering, sports event, conference, performance or show. It has become a fashion to use the word ‘event’ for everything. The main description for an event is something that “happens”. According to the dictionary an event is also defined as a planned public or social occasion. A more detailed description

would be that an event is an experience, which is crafted carefully to deliver a certain impact on the participants. There is a purpose behind every event, which is defined in detail before the planning process is commenced. The main purpose behind coordinating an event is to bring certain people together to produce a measurable outcome and share an experience. (Damm, S. 2012.)

Event management can be defined as the capability to control the process of purpose, people and places. Therefore, an event can be defined more closely as a happening with a purpose. The prime purpose and objective of an event can be strictly defined. There are many different purposes behind events. Some of the most common are social, professional development and recognition. (Raj, R. 2017)

Social events are designed to provide networking and different types of social activities to participants. The main goal is to develop connections or join a certain group together for special celebrations. An example of a social event can be a wedding, dinner or conference. (Dictionary, 2018)

A professional development event has a main goal of educating participants. The events are planned on topics of interest to the design community that promotes professionalism. These types of events will normally request a fee to offset costs. (Dictionary, 2018)

Recognition events are designed to acknowledge certain achievements. These can be organized for example as a dinner. Most recognition events include competition and prizes. The main goal for companies organizing these events is to help achieve certain goal within an organization and motivate teams. (Dictionary, 2018)

### 3.1 The history of events

The history of events can be tracked back to the early ages when communities would gather for religious celebrations and worship. In those days, the term event was not used for these gatherings. When societies started the creation of towns and social organisations, venues for these gatherings turned into an essential dimension of the towns planning process. For example, Roman towns created arenas and amphitheatres for different types of performance events. The main purposes for these social gathering venues then were to hold marketplaces for trade, performances and shrines. In those days, churches were a very important venue for gathering together people of the same faith for religious celebrations. You can still see some of these facilities in Europe and Asia, for they are still an important aspect of the structure of the modern cities. (Nolan, E. 2017)

In the 12<sup>th</sup> century events started gaining local identity and regionality. With the evolution of medieval town planning, central trade venues were created for market, religious activity and

fairs. These markets were placed in central locations providing events with an element of importance to the daily life, a theme that continues to this day. (Nolan, E. 2017)

The 18<sup>th</sup> and 19<sup>th</sup> century Industrial Revolution produced a large variety of significant products and equipment that helped events develop even further. One of the main developments was the enhancement of transportation. This allowed people to travel further so increasing the volume and easiness of reaching events. (Nolan, E. 2017)

Another major development was introduced to events in the 1970s with the construction of new generation large scale venues. The event evolution will always be connected to the social, political, environmental, economic and technological growth of society. This is why the event industry changes constantly. (Nolan, E. 2017)

### 3.2 The event industry

In the recent years, the number of events held has grown rapidly. Throughout time there has been debate on whether the event industry exists. The industry is so diverse that it is difficult to combine all these different sectors into one. Others believe the industry around events has evolved swiftly over the last three decades. Companies have become more aware of the impact of events and the opportunities it offers them. The financial benefits of events have been one of the key motivators behind the industry growth. Event management plays a vital role in providing development opportunities needed in the everchanging environment we live in today. Therefore, it is important to have an efficient and effective event planning process. The modern event industry is synonymous with innovation. The goal behind the industry is to build increasingly impressive events with new ideas using state-of-the-art technologies. At the same time there are also those certain rituals, traditions or nostalgia that needs to be included as well as expectancy to provide a financial return on investment. (Raj, R. 2017)

Event management still has a very unique status in the modern business world. Perhaps this is the reason an existing structure of literature cannot be found. Researchers still haven't been able to build a foundation on the event industry. Most research found on event management is descriptions of specific events and observances made during. Therefore, there is no framework yet proven to be sustainable, instead only best practices can be found. (Nolan, E. 2017)

The event industry is difficult to measure due to the global size. No formal research exists that would explore the full breadth of the industry. New opportunities however have been created worldwide with the vast development and growth of the industry. (Robinson, P., 2010.)

Internationally there is fierce competition for the staging of mega and major events. Countries compete against each other for the right to hold the Olympic Games, Rugby World Cup, FIFA World Cup and World Expo. Aside from the prestige that some of these events bring to a

country or city, the wider social and economic impacts of staging such events is often the key reason why the competition is so fierce. Events play a vital role in profiling a country as an attractive tourism destination and event tourism contributes significantly to a country's economy. (Van der Wagen, L. 2010)

### 3.3 Event technology

Nowadays, technology enhances each of our lives and controls our world. In the corporate world, technology has assisted in making everything more efficient and productive, provided the software's work as intended. All information input is archived and easily accessible immediately or in the future. The new easy systems and communication methods have become a time saver in the event management industry. They were designed to ease the pains of all event planners. (Saget, A. 2006.)

Modern technology has allowed many of the event operations to be carried out online. Event planners use these tools to assist in managing sections of the event to make the process less manual. The main technology solutions used include project planning systems, venue booking programs, participant management systems, security systems, broadcasting systems and communication systems. Technological advances are also evident in modern audio and video production, offering better quality, larger screens and remote conferencing. (Saget, A. 2006.)

Planners and organizers are always innovating, making use of the latest technology to keep their events cutting edge. This has driven many to turn their events into immersive experiences, making use of 3D animation and VR. (Davies, S. 2017)

Event marketing has now been made easier with the development of different internet programs and the social media. This allows event coordinators to reach a broader audience more efficiently. The main struggle though nowadays is to understand the best communication streams for certain participant groups. There are numerous possible streams online and to ensure maximum viewers, the right stream must be defined and utilized. (Saget, A. 2006.)

### 3.4 Different types of events

The term 'events' covers a multitude of different activities. Some of these include seminars, workshops, sports events, festivals, performances, conferences, fairs, celebrations and meetings. The one thing that these events have in common is that they impact their host communities with expenditures. The goals and objectives of each of these events is very different. This means that the event organizers need to understand these different goals and plan the event accordingly. (Raj, R. 2017)

Each event is designed and delivered for a specific client. They may be an individual needing assistance to deliver a personal event or then several people representing a certain company.

There is also situation where an organization employs an external event coordinator to deliver a certain event or a group of companies collaborating on one event. (Nolan, E. 2017)

Corporate events are events that support business objectives, including management functions, corporate communications, training, marketing, incentives, employee relations, and customer relations. (Silvers 2012)

Organizing varied events for internal as well as external clients and customers is one of the most important aspects of any company. One of the prime objectives for organizing events is to build on relations. Corporations encourage internal events aiming to motivate staff, develop knowledge and skills, as well as stay up to date on current trends. Staff are encouraged to attend seminars, conferences and conventions in order to keep them abreast with the latest updates in the field. (Chaturvedi, A. 2009)

### 3.5 Importance of event management

Corporate events and business entertaining are used by corporate North America to foster business development and growth and are a major part of a company's communication, sales, marketing and public relations strategy. Staged effectively, they can contribute to a company's success, standing, profitability and expansion and are equally successful with large and small companies that operate locally, nationally and internationally. (Allen 2008)

Events managed effectively can elicit peak performance from employees as well as produce team work among employees. On the other hand, events designed without taking into consideration company etiquette and ethics can seriously damage a company's image and even place the company's management in very high-risk situations. (Raj, R. 2017)

Corporations seeking new ways to stand out from their competition, take the lead in market share, entice top performers to work with them and retain key personnel started turning to business functions, both corporate and social, to help them achieve their objectives. Effective and efficient event management can allow companies to gain this competitive advantage for corporate events are dynamic sales, marketing and public relations tools that will increase the company image. Event management can be a great way to reach the company objectives. Events can help to increase brand awareness, recognition or company profile. It can also maximize employee performance, develop new business opportunities with shareholders or even stimulate sales. (Raj, R. 2017)

Events are held daily around the world, there are trade shows, training, marketing, human resources development, sport and athletic, and other corporate events. A successful event coordinator must have knowledge of formal and informal event practices and processes used by corporations. To be able to have this essential knowledge, the event coordinator must un-

derstand the corporate culture and differences in culture across corporations. Culture is defined as shared beliefs and values of a group. Corporate cultures influence the way employees think, how they do their work, as well as how they relate to one another. It has a great influence on the company functions. By clearly understanding corporate culture and the differences in culture of organizations, the event coordinator can provide value to the corporation and personal success. (Mikolaitis & O'Toole 2002)

### 3.6 Event Risk Management

Risk management is a key element in ensuring event success and participant safety. A new wave of terror attacks is changing the events security landscape as fast-moving, co-ordinated threats become an increasing risk. In recent years, terrorism has been a major threat to the event industry. Large scale events especially with participants from around the world have been main targets for terrorist attacks. The first line of defence for avoiding risks like terrorism is effective planning. Preparing and finding solutions when arranging the venue health, safety and emergency plans are crucial to avoid and prepare for these new threats. (Richards, A. 2011)

Although terrorism is unpredictable, event planners have needed to take a more strategic approach to ensuring the safety of all participants. Any event, whether it's the World Cup, Olympics or a rock concert, is at risk to become subject to extranormal violence based on political, social or religious motives. Since every event is different, there is no 'one recipe against a terrorist attack'. The event planner will need to factor in many different aspects when analysing the event's terrorism exposure, for example event size, venue, duration, location and politics. Planning and risk assessment for a large-scale event includes looking at the general political climate, previous threats and hoaxes, as well as collaboration with police, other emergency services and public authorities (Ali-Knight, J. 2009)

Some of the main events targeted by terrorism are sporting events. Sporting events are considered as part of the nation's critical infrastructure and are one of its key assets. One of the major reasons behind terrorist activity is to destroy or weaken critical infrastructure. The attacks are targeted to destroy key resources, cause mass fatalities, weaken the economy as well as damage national confidence and morale. Therefore, sport events have been identified as targets due to mass casualties, widespread media coverage and social impact. (Hall, S. 2012)

There are other sources of unsuspected violence that may break out at any event in addition to terrorism. Throughout the years, there have been many cases of mass shooting, fights, as well as other violence that have occurred at mass events. The 2017 Route 91 Harvest Festival in Las Vegas is one of the most recent incidents where a gunman opened fire on the participants of a music festival. The outdoor festival had 22,000 participants of which 59 were killed



and 527 injured. In situations like this one, participants would need to be able to exit the venue easily without causing further injuries to other participants. This requires for an effective emergency plan including multiple exits. (Frisk, A. 2017)

Securities are to be properly integrated but proportional to budget. The increasing need to increase security at large events is expected to increase event costs drastically. Site visits are great opportunities to test reaction plans for different situations as well as evacuation routes, alarms or event mobile device reception. Even small events should be prepared with some best practice elements such as contact lists and evacuation plans. (Ibrahim, M. 2016)

### 3.7 Event coordinator/planner

The process of planning an event must be undertaken to ensure it is adequately conceptualized. Planning leads the coordinator through the different areas and activities required to successfully execute an event. This process ensures all objectives and goals are achieved. There are several aspects to planning a successful event. Therefore, it is very important for an event coordinator to understand the nature of the event and have the required skill set to coordinate through the process that is integral to event management. (Carter, L. 2007)

The event planner is responsible for executing the event from start to finish successfully. To start the process, the event theme and ideas need to be conceptualized. In this stage, the event planner together with normally at least a small team, ideate the theme that will then guide the direction and the planning process of the event. Another main role that the event planner has is to define and set the event objectives and goals. This is important for the goals and objectives give a focus to the planning and executing process. They form the base of the plans. An event without a clear objective has a very low probability of success. The main responsibility of an event coordinator is the management of resources, details and people. It is important that the planning process is not lacking in any of these areas. For example, a lack in man power can cause delays to the event schedule. The deadlines and budget are imperative to the success of an event. Therefore, the event planner will need to monitor and control event costs and schedule. After the planning process, the event will need to be managed on-site. This includes appointing site managers, hiring volunteers and overseeing the preparation. The last stage of an event planner's role is the evaluation process that takes place after the event. This stage includes following up with participants and management to evaluate the success and satisfaction rates. (Carter, L. 2007)

To be successful in the field of event management the planner must have some essential skills. The most important skills are the ability to negotiate, be creative, be convincing, coordinate and plan efficiently as well as the ability to execute and implement plans. The event industry is a people's industry meaning that everything is based on communication skills. The

event coordinator manages contact with all stakeholders, making communication key to arranging an event without problems arising. (Mancuso, J. 2007)

Nowadays, sustainability is a big factor in the event management industry. Event coordinators are required to consider the economic impact and the sustainability of each event they manage. Risk management is another skill that is essential to modern event planners assisting in minimize risks and improving participant experience. With the ability to assess risks, event planners can assess and identify all legal compliance issues as well as financial issues. There is normally a lot at stake for those hosting the events, financially they are expensive and revenues are uncertain. Having a skilled event coordinator is key to relieving uncertainty and risk. (Kilkenny, S. 2011)

#### 4 Introduction to conferences

The history of conferences is as old as the history of mankind. The engine of human evolution is regarded from the ability to communicate with language, discuss and pass on knowledge. Looking back, even stone-age tribes of hunter-gatherers organized themselves, divided up work, had gatherings, followed certain rituals and profited from the council of elders and the wise. (Englich, Guido, and Burkhard Remmers. 2008)

According to the dictionary a conference is described as a formal meeting for discussion. Conferences are mainly built around educational content and discussion that serves to enlighten and inform participants. They are a great place to network and share ideas. Each conference is different and can include entertainment elements, catering, team development exercises or other additional elements arranged by internal or external vendors. Vendors are people or companies offering something for sale, like certain services for an event. (Rogers, T. 2013)

Every conference has a completely different purpose. There are four main purposes for conferences. These are academic, trade, business or unconference. Academic conferences are gatherings where participants present their research findings in different ways for example workshops. Business conferences on the other hand are focused on participants working in the same company or industry. These gatherings allow for the in-depth examination of new trends and business opportunities. Trade conferences are a more large-scale version of a business conference, where participants are both internal as well as external. They are a place where connections and networks are built between participants. Unconferences are low cost, unsponsored, top down hierarchy avoiding conferences where participants have an equal amount of knowledge and power to influence the topics discussed and decisions made. Not only are conferences categorized based on its natural purposes but they are also classified based on the real nature of conferences themselves. (Mair, J.2013)

There are four main types of conferences. These include symposium, seminar, workshop and round table. Symposiums are casual gathering where refreshments and entertainment are normally provided. Seminars are gatherings where particular topics are discussed and each participant leaves the experience having obtained a certain source of knowledge. Workshops are focused on providing a hands-on experience, using demonstrations and different activities. Round table conferences are use in situations where participants are needed to exchange thoughts or opinions on specific topics. The participants are all seated around a table, causing this type of conference to have a limited participant number. Below is a table representing the connection between purpose and the best type of conference to fulfil the purpose. (English, Guido, and Burkhard Remmers. 2008)

Purpose	Type
Academic	Symposium
Business	Seminar
Trade	Workshop
Unconference	Round table

Table 1 Conference purpose and type

A company can both attend as well as hold conferences. Companies that attend conferences normally have very different objectives than the companies that arrange them. Conferences can also have different purposes and so have different invitees. They can be limited to employees of a certain company or then be industry related, providing sponsorship and networking opportunities with other competitive companies, suppliers or even clients. Large scale conferences are normally arranged annually and the length of the conferences may vary. They can also be held in other cities or even other countries, so conferences are not always local. (Mair, J. 2013)

The main role and skills of a conference coordinator are mainly like those of an event coordinator. The conference first needs a purpose and then it is up to the conference coordinator to decide the type of conference that best fulfils that purpose. The next steps would be to define the goals and objectives which then become the centre of the whole process. (Key, C. 2004)

When thinking of a conference organiser, typically the person responsible for all the conference logistics comes to mind. However, the role of a conference organiser extends far beyond that. They are responsible for developing the big picture. The conference planner will develop a vision for the conference with realizable goals and objectives that is maintained and supported by the details of the event. (Key, C. 2004)

## 5 Analysis of the company X conference planning process

The main conference that will be examined is conference X. The main purpose of this analysis is to define the main pain points within the process. This guide can then be used to coordinate any event. Conference X is a professional development event. It normally consists of around 600 internal employee participants from all around Canada.

### 5.1 Defining the purpose, scale and budget

Since conference X is organized by the company Meeting and Conference Coordinators, the main purpose is defined by the Conference Lead and the company leadership team. The Meeting and Conference Coordinating team assist in coordinating mostly professional development events. There are many other types of events arranged by the company annually. The first step, 8 months prior to the event, is to define the purpose of the event.

Identifying the scale occurs in the start of the planning process, normally 6-8 months prior to the event. This includes defining who the attendees are, how long the event will be and how many details are involved. The main outcome of designing the scale is to define what the planning committee will look like. In most cases, the core committee consists of the Conference Planner and the Conference Lead. If the scale of the event is as large as conference X, the planning committee can be up to 20 people.

All conference content is designed according to the participants. The numbers play a large role in the budget. The participant numbers need to be analysed and managed carefully to not exceed the budget.

Participant lists are managed using MS Excel and include the participants name, role, division and email. The list is first divided into separate sheets according to the participant role. The role numbers will then be calculated together on the first master sheet to determine the total participant count. This master sheet needs to be updated every time a participant is added, information updated or removed, making the process very manual.

Every conference has a budget. The budget is based upon how much income is expected from all sources set against the expenses that are anticipated. (Key, C. 2004)

All annual company events will have a pre-determined budget. This budget is determined around the month of August and confirmed 6-8 months prior to the conference by the Conference Planner and Communication Manager. The main aspects effecting the budget is the event purpose and scale. Meetings will be arranged between the Conference Planner and Communication manager to define the total annual budget for all company events.

The whole execution of the conference is reliant on the budget. This allows for the conference coordinators to define for example how many participants can be covered under the

budget, where to accommodate the conference, what catering can be provided etc. The process to define the budget for conference X starts with the conference coordinator going back to the budget calculations from previous years. This will allow for the coordinator to build estimates on the expenses for the current year. The conferences have been organized in different cities every year causing the expenses, accommodation and participants to change. The main cities where the conference has taken place are Ottawa, Montreal and Toronto. This can make it very difficult to estimate a budget. The coordinator must analyse the different factors very carefully to build an estimated budget that will hold.

Consumer Prices in Toronto are 8.85% higher than in Montreal. Consumer Prices in Ottawa are 1.60% lower than in Montreal. (Numbeo, 2018)

The budget is built calculating 6 different areas; logistics, accommodation, travel, communication, marketing and learning. Once the estimate for the conference has been defined, this budget proposal will be sent over to the company leadership for approval. The budget must be analysed according to the company's financial wellbeing. The importance of the conference and the timing of the request are also large factors that influence the decision.

## 5.2 Designing the theme

The theme of the conference is connected to the objectives and purpose of the event. It is important that the venue reflects the theme and all the vendors offer services with the same theme in mind. The hotels and conference centres are contracted for such big conferences up to a year before, making it a challenge to connect these two. To reflect the conference theme, the coordinators are to do a site visit to understand the space and potential. This will give them an idea of what is possible and what needs to be contracted externally. For the 2018 conference X, located in Montreal. The theme was a Montreal French influenced overall theme with the objectives of influencing participants to broaden their mind. This objective was reached by providing the participants with opportunities where they needed to try new things. The first step when the theme is designed is to conduct a thorough research on external vendors. This is when the ideation phase starts. Building the planning committee

## 5.3 Building the planning committee

The Planning Committee can be one person or 20+ people depending on the scale of the event being planned. Events such as conference X have such a large scale, making it impossible to organize alone. Building the team is an important role for the conference coordinator. Everyone in the team is responsible for executing the tasks well for the conference to be successful. The easiest way to delegate tasks is to divide the biggest task (organizing the conference) into smaller areas of responsibility and then assign individuals to these categories.

Conference X is a large part of company X's employee development.. Therefore, the core conference coordinating team consists of a Conference Lead and a Conference Coordinator/Planner. The main tasks that are delegated to different internal specialists that then form the planning committee include logistics, marketing, communications, volunteers, registration, recognition and learning.

The most effective planning requires expectations to be clear to all involved. This includes defining and managing the team's pre, during and post tasks. If the milestones are unclear during the process, the Conference Coordinator will face many challenges. Each member of the planning committee will need to be familiar with their responsibilities. This will ensure they contribute to the best of their ability.

Each member of the planning committee needs to complete their tasks on time for deadlines to be met. If one of the members is behind on schedule the whole process is behind schedule. Therefore, it is important to build the planning committee out of employees who get their tasks done on time and know how to prioritize their work.

It is also important to define the best way to stay connected and evaluate progress. Scheduling meetings and designing milestone documents are one way to manage the planning process. This is difficult in a mostly flex working environment, flex meaning employees working mostly from home. The communications plan is designed to manage all touch points with the planning committee. The conference X communication plan includes setting up weekly meetings with the planning committee members using Skype. Technical problems being one of the main threats to this type of communication, there is always the risk of certain messages not being transferred successfully. The core conference coordinating team, usually consisting of 3-4 people, sets up meetings once a week to discuss progress. The meetings are held more frequently closer to the conference. About 2 weeks to one month prior to the conference, the core planning team sets a meeting face-to-face that lasts several working days. The main goal of this meeting is to discuss all last-minute decisions and review the full sequence of events document. Gathering the group together allows for decisions to be made more effectively and without delays caused by remote communication.

The sequence of events document defines a detailed minute by minute schedule for the full event. It includes all small and large details and mentions the individuals responsible for executing certain tasks on-site. This document is then used on-site to manage timing, speakers, volunteers, lighting, participants, food & beverage as well as AV. The sequence of events can be shared with the venue personnel as well to make sure their room set-up timing is accurate. The conference lead is responsible for putting together this document during the planning process.

#### 5.4 Scheduling meetings

To arrange the conference efficiently with a broad team, meetings need to be scheduled weekly. This allows for information to be exchanged affectively. Company X is a company with flex and fix workers. Flex means that the workers can choose where they wish to work from, for example from home or a cafe. This means that meetings will need to be flexible of everyone's working arrangements. There can also be employees working in different provinces of Canada, making time differences also another problem. This makes communication more challenging to arrange for the coordinator. The main programs that the company has taken into use to solve for this problem is Skype for Business, Outlook and SharePoint. Conference coordinators can schedule the weekly meetings over Skype allowing for any employee to join online once they are invited. SharePoint has also allowed for all documents created during the planning process to be shared efficiently online for anyone to access. Outlook calendars are synced with skype for business allowing for alerts to be created before meetings. All meeting requests are created with Outlook as easily as sending an email.

Skype for Business is a software that allows employees to get their team together in a more easier way, requiring only a link to be shared. This software requires the internet and can join even up to 250 people together online for meetings. This program is also available on any device, making it easy for those working away from the office. It allows the host to schedule meetings right away or schedule them for later dates by using the combined features on Outlook. The meeting URL link is personalized for the host making it impossible for others without the link to access the meeting. This program can also be used for instant messages, which is much faster that sending emails to colleagues many times a day. The program also allows for calls to be recorded, making it possible to listen to them later or even forward to those who could not participate.

Company X employees use Skype for Business daily to interact and connect with colleagues. The main features that the conference coordinator requires is to set up meetings with all of the planning committee. Instant messaging also makes it easy for coordinators when they need to exchange information fast. Conferences have a lot of visual and conference coordinators use Skype for business to present content to meeting participants. This makes it easy for data to be presented without the face to face contact.

Since everyone in the company uses Outlook and Skype daily, there are many situations where the program crashes or the internet disconnects. This causes problems for the planning process for without the online programs, the coordinators have no way of communicating or presenting information to the planning committee. Not everyone in the company has a company phone, so the online programs provided are the only way to connect to other flex workers. The planning committee needs another type of communication method like Skype that could be used even when Skype or Outlook crashes and contains the same features. The team uses

WebEx to communicate with external vendors without Skype, but this program is fairly unfamiliar to most of the employees in the planning committee.

Outlook.com is a web-based suite of webmail, contacts, tasks, and calendaring services from Microsoft. It is one of the world's first webmail services and was founded in 1996 as Hotmail. It was replaced by Outlook.com in 2013. Similar to other major webmail services, Outlook.com uses Ajax programming techniques and supports later versions of Internet Explorer, Firefox, Safari, and Google Chrome. Some of the main programs include message filtering, folder-based organization of messages, auto-completion of contact addresses when composing, contact grouping, importing and exporting of contacts as CSV files, rich text formatting, rich text signatures, spam filtering and virus scanning, support for multiple addresses, and different language versions. The calendar function is connected to Skype making it easy to access meetings from both programs. The calendar has different views available, to do list functions as well as different meeting creation tools.

Most communication throughout the planning process is exchanged with Outlook. The program allows for multiple mailboxes. One of the first tasks for a conference coordinator is setting up the conference mailbox. This will allow for the communication to be separated from the daily noise. This mailbox is also a great contact for participant requests or information. The mailbox can be set up by the company's externally resourced service desk. They create a ticket for the request and the request is processed and fulfilled within a week normally. Since the service desk is externally resourced, this makes it slower to process all program or technology related requests.

SharePoint is a web-based, collaborative platform that integrates with Microsoft Office. Launched in 2001, SharePoint is primarily sold as a document management and storage system. The product is highly configurable and usage varies substantially between organizations.

The planning committee uses this program for storing and sharing all conference related files. This platform is easy to access from any device and allows for individuals to make edits to the documents without having to redownload the document into the system every time. This allows for an up to date experience making it impossible for all users to have different versions of the document.

Company X is currently in the process of updating the platform to the O365 version. This will allow for an easier user experience. The access rights to the system are currently managed by the company external service desk, making acquiring access rights a longer process.

SharePoint has other programs within the platform, like InfoPath, which is used for designing the conference registration forms. Using SharePoint makes it easy to manage participant registration information and export as well as filter the data in different formats. InfoPath is not



an easy program to use, making training a longer process. The company only has rights for a few users to have access to this platform, so there can only be one on the events side with the capability to create the registration forms, the registration specialist.

### 5.5 Review data from previous years

One of the most important aspects to review in preparation for the initial planning committee meeting is the information gathered from conferences arranged in previous years. This data will be useful when estimating budgets and defining best practices. By reviewing survey results from previous years, running into the same problems can be avoided and suggestions participants wrote down can be taken into consideration. Themes and objectives are different for each conference, but by reviewing these together with different data, negative experiences can be avoided. Location is key, if the facilities are inadequate and catering is horrible, this location should not be ears to come. It is good to learn from past mistakes to avoid repeats and constantly develop the event to ensure a positive experience. One of the most important aspects in the event is the budget. Therefore, reviewing past budgets projected vs. actual budgets can give an accurate estimate for future conferences. Lessons learned is another way to review aspects that can be improved in future years. This way the same mistakes are not repeated.

### 5.6 Initial Planning Committee meeting

The initial Planning Committee meeting will take place 6-8 months prior to the event. The Conference Lead will be responsible for leading the discussion. The goal is to communicate the purpose, scale, milestones as well as any other important task related details. During this meeting, the different roles for each Planning Committee member will be defined in the conference planning process. It is important to also include the general budget information.

The Conference Lead is also responsible for taking notes during the meeting that may be important to the process. Risk analysis is also a crucial part of the initial meeting. For efficient execution, it's necessary to analyse early identification of red flags i.e.: Dates, conflict with another conference, suggested activity seems like it may break the budget, location is not accessible etc.

This meeting also allows for all members to ask any questions that they may have. It is better for everything to be clear in the beginning to avoid any confusion or problems. This will help to avoid surprises. If the Conference Lead cannot participate in the meeting, they will need to have the Conference Coordinator lead the meeting or then reschedule.

### 5.7 Defining the conference milestones

Milestones are specific points in the event timeline that are important to the completion deadline. When working in teams, milestones help the conference coordinator to examine the

progress and set specific dates for certain tasks to be completed. This will help the coordinator to define whether the conference planning process is on schedule.

The main deadlines that need to be defined when managing conference X are;

TEAM	TASK	DEADLINE
CONF. LEAD	Define the Purpose, Scale & Budget	6-8 months prior
	Determine Planning Committee roles	6-8 months prior
ALL	Initial Meeting	6-8 months prior
	Arrange weekly meetings	6 months prior →
	Book external vendors	4 months prior
MARKETING	Theme confirmed	5 months prior
	Logo created	4.5 months prior
	Material templates created	3 months prior
	Digital signage created	1 month prior
	Nametags designed	1.5 months prior
	Swag decided and ordered	4 weeks prior
REGISTRATION	Registration form created	4 months prior
	Send reg. form to translation	4 months prior
	Conference page designed	4 months prior
	Send registration	3.5 months prior
	Reminder emails	3 months prior
	Rooming list deadline	3 weeks prior (depending on hotel contract)
VOLUNTEERS	Volunteer lead selected	5 months prior
	Volunteer selection email sent	4 months prior
	Volunteer interviews	3 months prior

	Volunteers confirmed	2 months prior
	Volunteer meeting	1 month prior
	Volunteer recognition dinner	1 day prior
LOGISTICS	Contracts Signed (Venue, catering & AV)	6 months prior
	Connect with venue	4 months
	Photographer booking	2 months prior
	AV deadline	2 months prior
	Conference app contracted	1.5 months prior
	Parking arranged with venue	1 month prior
	Food and Beverage deadline	4 weeks prior (according to contract)
	Ship materials to hotel	1 week prior

Table 2 Milestones document

Most deadlines in the milestones document created by the conference coordinator are dependent on one another. This means that if one of the milestones is overdue, there will be a delay on another task. Managing this document is one of the most important responsibilities of a conference coordinator.

### 5.8 Logistics

It is important to have a location contracted early in the process of planning an event. For large events, like conference X, the hotel and conference centres are contracted even years before the conference.

The contract is made by a meeting planner and signed by a higher manager and procurement specialist. The main information negotiated in the contract includes the room block, room rates, all hotel service charges, taxes, deadlines for providing data to the hotel, meeting space rentals, food and beverage, billing arrangements and cancellation policies.

The room block defines the dates when rooms will be blocked and defines how many rooms are available per night for the conference use. All the rooms under the room block will have a special rate negotiated by the hotel and meeting planner. This conference rate is normally a

lower rate, for the hotel offers lower rates when booking a larger amount of rooms. The conference coordinator will need to make sure to provide the hotel with the rooming list before the deadline specified on the contract. The rooming list is to include the participant name, addresses, arrival date, departure date and billing instructions. After the deadline the hotel will release the unoccupied rooms for the hotels other clients. The conference rate will not be available for any extra rooms booked after this date.

Service charges are provided for all of the different services the hotel may provide. These charges include luggage handling, room delivery charges as well as bell captain services. None of these services need to be used but if the conference coordinator decides to do room drops, the hotel will need the information of every participant who will receive a room drop and the charge per guest will be applied to the master account. All of the room drop items will need to be provided to the hotel early for the arrangements to be made.

Complimentary accommodation or additional concessions may be offered by the hotel when a certain amount of rooms are booked. The hotel may offer conference rates for pre- and post-room nights. They may also provide a certain amount of room upgrades or complimentary meeting spaces. Other additional concessions may include complimentary internet in all rooms, VIP welcome amenities or complimentary staff rooms.

The contract must inform the coordinator of all the taxes the rooms, food, beverage and services are subject to. The taxes may change depending on the city the hotel or conference centre is situated in. These taxes are automatically charged to the master account.

The main details in the contract that a conference coordinator must note are the deadlines. The hotel requires certain information be provided to them by a certain date. The main deadlines are rooming lists, food and beverage, room drop off dates and cancellation dates. Providing information late can cause extra charges or service fees.

Each hotel has their own event coordinator that works together with the client to ensure all the services and spaces are booked. The hotel event coordinator provides the client with meeting space grids as well as arranges the pre-conference tours so that the conference coordinator can decide which spaces are more suitable for the conference. When the conference rooms have been decided, the event coordinator will block these rooms for conference use. Cancelling charges will be applied if rooms are cancelled after a certain deadline.

Food and Beverage prices will be confirmed by the hotel normally six months prior to the event. The food and beverage deadline requires all menu arrangements to be supplied by a certain date. If this deadline is not met, the hotel cannot guarantee menu contents and other

arrangements are provided. The total meal covers will need be provided to the catering representative by a certain date prior to the conference. Cancellation provisions will be charged if the conference coordinator fails to meet the food and beverage commitments.

The billing arrangements will need to be provided to the hotel before signing the contract. The room, tax and parking charges will be charged to the master account according to the information provided on the rooming list. Individual personal nights will be paid by the participants themselves. Meal and beverage charges arranged by the conference will be charged to the master account. Individuals are responsible for their own meal charges that have not been arranged by the conference.

A deposit is to be paid to the hotel by the deadline stated in the contract. Cancellation policies are also stated depending on the cancellation date. From 181 days to the signature of the contract, 30% of the anticipated room night revenue will be charged for cancellation. From 91 to 181 days prior to the event, 50% on anticipated room night revenue will be charged. From 31 to 91 days prior to the event, 75% anticipated revenue will be charged and from 0 to 30 days prior, 100% anticipated revenue will be charged. These percentages may change between hotels but they mainly stay close within this range.

Staying connected with the venue is key to ensure all arrangements and requirements are met. The introductory connection should be made 4 months prior to the event. This is arranged by email and a face to face meeting is scheduled. In this meeting, the logistics lead will introduce the planning team to the venue staff and all venue staff will be defined for the event. This meeting can also be a great opportunity to learn more about the space. Therefore, arranging the meeting at the venue would be the easiest way to get an accurate picture of the spaces available.

Once all AV requirements are confirmed by the speakers, the lead in charge of logistics will communicate all needs to the AV provider. These include microphones, cords, projection, presentation as well as recording needs. AV is not cheap; therefore, it is important for the conference budget to choose the cheapest vendor.

All details including AV, room setup and catering requirements will be gathered together into a function sheet. This function sheet will include all minor details for the location and planning committee use. The document is separated by rooms and includes times, function name and main contacts.

Conference X hosts many different sessions throughout the day. The meeting spaces need to be defined and arranged according to size and session requirements. The venue and meeting planner will negotiate which rooms the conference will need and these are then divided for the conference use. The conference coordinator will need to estimate the attendee amount

for each session and according to the seating availability in the rooms, assign the rooms for sessions. Another aspect the conference coordinator will need to take into consideration is the audio-visual capabilities of the room. To decrease costs, the coordinator will want to assign the sessions that have high AV requirements into rooms that have all the capabilities. The coordinator will let the venue know before the event on all the AV needs for every session. The venue can then provide a quote for everything. If the venue does not have the AV requirements the conference needs, these will need to be externally contracted, which is more expensive.

The room setup can be arranged in different ways. This means that there are multiple options that the venue offers for seating arrangements. The room setup style will need to be defined by the session type and needs. The most basic types of room setups styles include theater, half-rounds, reception, conference and classroom style.

Theater style is when the room is set up with just chairs, no tables. The chairs are laid out in rows all facing the front of the room, where the stage or speaker will be. This type of set-up is best for presentation or lectures where participants only need to listen and not take notes. Most performances are set-up in this style, for example concerts.

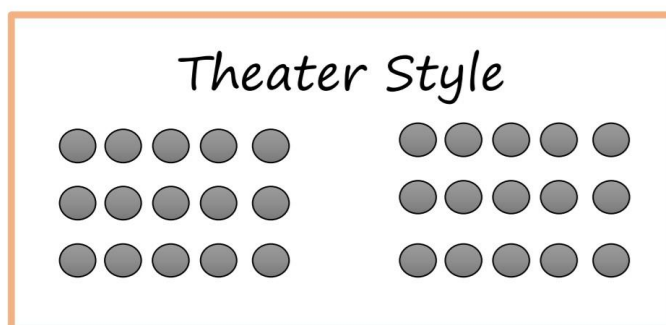


Figure 1 Theater style room setup

Crescent or half-round style has round tables set up around the room with chairs around the back of the table facing the front of the room. This way no one is seated backwards with their back to the presenter. This set-up is ideal for sessions including meal service, for participants can eat at the same time as watching a presentation. This set up is used for different types of business or formal dinners with large groups. Half rounds are normally used in theaters, weddings and training events.

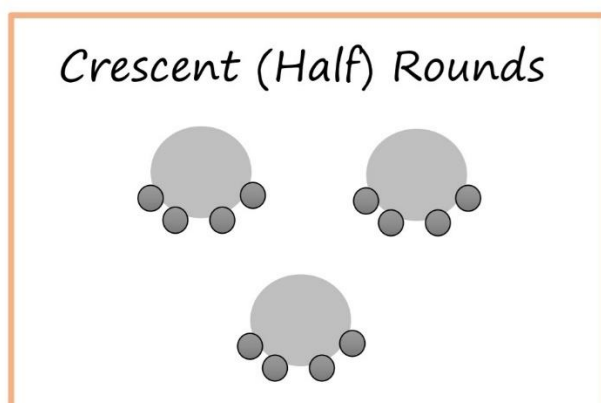


Figure 2 Crescent(Half) rounds style room set-up

In a room arranged in reception style, there are a combination of round tables and smaller cocktail tables neatly arranged throughout the room. The room can also be set up with only cocktail tables. This is usual for reception events where participants are not normally sitting. Reception style is used for networking sessions where participants need to move and talk to lots of people. There are other types of seating that you can arrange in the room to trigger different types of interaction. Sofas for example are a very usual addition that'll make people feel more comfortable.

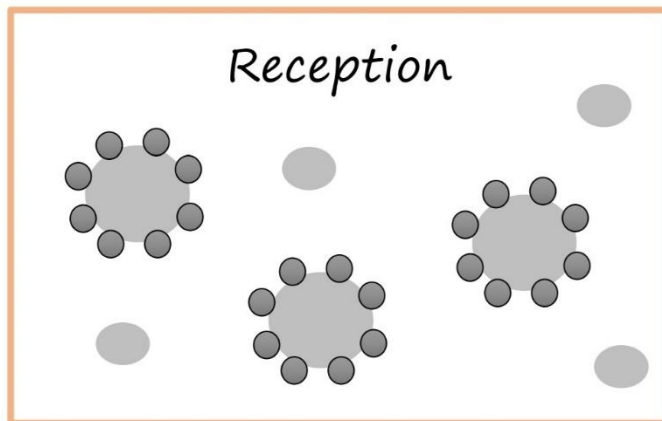


Figure 5 Reception style room set-up

Conference style is the most basic room set-up for smaller meetings. This style includes many tables together, or one large table with seats all around. This set-up is perfect for discussions or teamwork. All participants can easily tell their opinions and inputs to every subject discussed. Most basic meeting rooms use this room set-up. The only downside to this set-up is that there is a limited amount of space around the table, making it very difficult for larger groups.

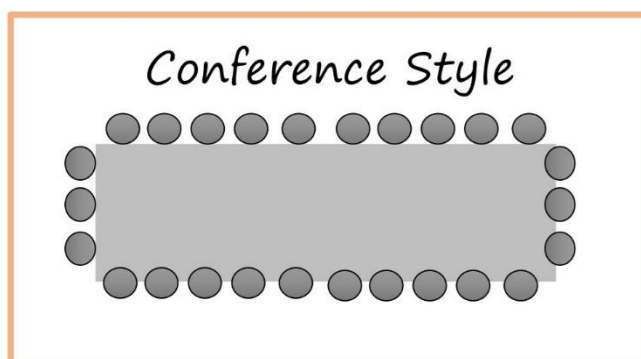


Figure 6 Conference style room set-up

Classroom style is when rows of tables are arranged with all participants facing towards the front of the room. This style is used mainly for lectures or training sessions. Participants can take notes but this style is not the best for group work. Most schools use this style.

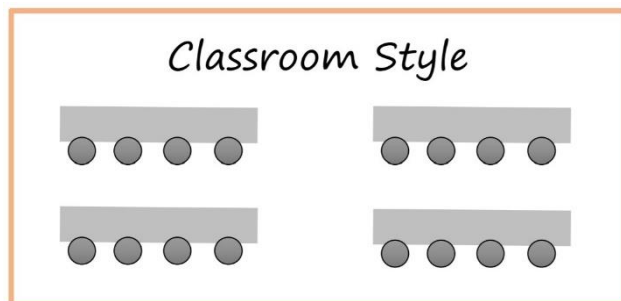


Figure 7 Classroom style room set-up

Conference X has many catering opportunities. The catering is normally externally contracted, unless the hotel or conference center where the conference is held offers catering. The conference coordinators have many years of experience of planning events, allowing them to know many catering companies and knowing which ones were the most successful. Currently the event planning team is developing a vendor repository to make it easier for all company X employees to find vendor contacts and reviews. The vendor repository will include entertainment, hotels, restaurants, catering and bakeries.

When contracting a catering company, it is important to note what they will provide, for example, cutlery and serving dishes etc. If they do not provide these then they will need to be externally contracted from another company. The participants invited will inform the planning committee of any special food diets or allergies on the registration form, which will then be taken into consideration when planning the conference menu. Each participant will need to be provided with enough food throughout the conference to ensure they are healthily nourished. To define the correct amount of food is ordered the conference coordinator will need to estimate a budget per person depending on past experiences.

The next step when the company and menu has been confirmed is to ask the company for a quote. This is normally also a combined contract once the document is signed. The quote is sent to the event procurement specialist for signing and the deposit is paid.

All participants are responsible for booking and paying for their own travel using their company master or their own credit card and then expense the amount back to the conference. Those participants coming from different offices around Canada will book their travel through Concur, a site the company uses with travel deals on flights, trains etc. This ensures the participants book their travel at a low price and the travel budget is not exceeded. The logistics lead will need to make sure that all the information needed to book travel is included in the conference webpage



Parking opportunities need to be confirmed with the hotel and the total parking count informed once the information is gathered. Participants are to inform their parking requirements on the registration form. When everyone has registered, the registration lead will collect all the participant information of those needing parking into an Excel sheet. This list will then be sent to the hotel two weeks prior to the event at latest. The information required will need to have the participant name and the duration of their stay. Parking costs will be charged to the conference master and any personal night parking will be paid by the individual themselves.

### 5.9 Learning segment

The conference learning is connected to the conference purpose. The learning lead will research different external and internal speakers that can provide sessions promoting this purpose. They are also responsible for providing and assigning CE Credits and confirming they are accepted.

When all the speakers have been defined, the branded conference MS document templates are sent to all speakers to gather their session descriptions. These notes are then analysed and finalized. The communication lead will then create session synopses capture the session learning. These session synopses are forwarded for translation and then to the conference app vendors who will add the session titles, speakers and descriptions into the app for participants to find when the app is launched and participants are required to sign up for sessions. The session titles, speakers, descriptions and speaker roles will need to be gathered, translated and added to the conference final agenda. For external speakers, the learning lead will need to create bios based on information they have gathered online and by contacting their agents. These bios are then sent to the communication lead to confirm and sent to translation.

The learning segment is important to the planning process for the conference coordinators need to define what is the expected outcome of the conference. This will allow for the success of the conference to be measurable by the post conference survey.

The conference will include both internal and external speakers. The main subjects are corresponding to the conference purpose. Mainly the internal speakers every year are members of the company executive leadership team. These include the Chief Executive Officer, Executive Vice Presidents and Chief Financial Officer. The role of the executive leadership team is to really emphasize the main learning and bring forward future operations and changes.

Every conference has also a group of external speakers hired from different agencies. These speakers bring forward new knowledge, upcoming trends and best practices in the physician and financial management sector. All speakers have a main message and knowledge base the

participants are expected to walk away with after the experience. The speakers bring forth new techniques and development for the employees to ensure they offer the best possible financial services to their clients.

The external speakers come from all around Canada, as well as other countries. Once the speakers have been chosen, contacted and dates secured, the learning lead will manage the contracts with each individual speaker. The contracts are important to define everything the speaker will provide as well as everything the conference will need to provide. The main elements the conference coordinator will need to know are the speaker AV, accommodation and travel requirements.

The conference agenda is created during the planning phase when all the speakers and sessions are defined. The agenda created in the planning phase may change but it is important to secure the agenda at latest a month before the conference. The agenda will include the time and date of each session in detail. The session titles will be included for external speakers. All the session rooms will also be included, so participants know where to find each session during the conference.

There may be different agendas used prior to the conference. This depends on the conference app used. The conference app includes an agenda section where participants can see more in detail the descriptions of each session. In a conference where participants can choose the sessions they will be participation in, it is important to have all the speaker bios as well as descriptions available for every session. This will allow the participants to understand and define which session they are most interested in or which session is most valuable to their field.

Conference X has both main plenary sessions as well as live jam sessions. The main plenary sessions are compulsory for all participants. In the conference held in 2018 these sessions included very valuable content that supported the conference objectives and purpose.

The main plenary sessions are normally held in the beginning of the conference and at the end. They are divided into morning and evening sessions with up to 3 speakers in each session. It is important to arrange the agenda in a way that makes the participants enjoy the full conference experience. Therefore, the main plenary speakers need to be intriguing and inspirational to set a mood and theme for the conference. The sessions are used to kick off the day and to provide closing remarks to reflect the conference day.

Concurrent sessions can be 5 minutes to 1,5-hour sessions offered at the same time in the day. Participants can choose which session they wish to participate in. Each conference has a different amount of concurrent sessions. The themes and objectives for each of these sessions are different. They may include role specific training or knowledge exchange. They can also

have external speakers aiming to influence a larger field with best practices, building connections, inspiring for change or informing on new trends.

#### 5.10 Communication

There are many different types of communication that the conference coordinator needs to manage. The main communication section of the conference is delegated to the communications lead. This is someone who will manage when, what and how communication will be forwarded to participants.

The communications lead has a large role to play in the conference planning process. A lot of the preconference tasks require communication assistance. This person normally needs to be bilingual to make sure that all communication is offered in both company languages. The first contact with this planning committee member is arranged after the theme is decided. This is when the specialist is to start creating the communications plan for the conference. This includes creating an agenda with different communications milestones. Some of the main tasks that the communication specialist takes on include creating the initial participants invite email text, assisting in creating content for the conference webpage, creating the delegate handbook and planning speaker synopsis. This requires for the person in this role to have great written skills to produce lots of written content. This person will work closely with the conference coordinator throughout the planning process.

Company X is a bilingual company with many employees who live in French provinces like Quebec. This means that all materials need to be translated in both English and French. In a big company like this, there needs to be a translation team to make sure all communication is translated correctly. There are employees within the company that do not speak any French, making this translation team very important to the company's operations. The company also has a large French clientele requiring all external forms and financial services are provided in French.

Even though conference X has a larger participant amount of only English-speaking participants, there is still about 50 employees participating who have French as their mother tongue. This means that the conference logo and all materials need to be translated into French. This translation is done by a certain software that the translation team uses that can be accessed by any employee. All company X employees can create a translation request by providing the document of text needing translation, the project code as well as cost center. The communications lead is responsible for submitting all conference X communication documents for translation. The conference has its own cost center and project code, which is used for all conference related requests.

Translating large amounts of text take some time, which needs to be taken into consideration in the agenda. The communication lead must make sure to provide translation with the documents well before the deadlines for publishing the content are due.

#### 5.11 Creating the conference webpage

Adequate website design engages individual's attention and provides what they need quickly and effectively. Though, great website design does this while putting you ahead of your competitors, celebrating what you have to offer and ensures your event is a clear option for those attending. (Sengun, Z. 2016)

The conference webpage is designed as a joint effort by many members of the planning committee. Since the conference has been arranged annually, the conference coordinator has access to all the previous year's conference content. This allows for the page creation process to be more efficient. The coordinator can look back at the information provided in previous years and even copy some of the formatting or information that will not change. The main change on the webpage is the design. The design of the webpage reflects the logo colours and outlay. This makes it very important for the logo deadlines to keep, for the webpage cannot be finalized before the logo is added. The conference webpage is published in the company intranet, where everyone can access it.

The main difficulty when creating graphic pages like the conference webpage on a company intranet is the lack of visual features. The program makes it very hard to organize pages the way the creator wishes for them to be designed. This process can be made easier with the option of inputting pages through MS Word. Word has many visual features available to create different types of designs. The pages do not always transfer over to the intranet in the way they're designed on Word. This makes the page creation process a real problem. There have been best practices created and users are constantly learning work around methods to use the program. One of the main designs that has been most successful from a user point of view has been the 2018 conference X webpage design.

The most important content, be it words, images or symbols, should be placed across the top of the design where it will be seen first. (Jackson, N. 2017)

The main page of the conference is important for it is the first view participants land on when accessing the conference page. This page needs to be clear and make it easy to scroll through. The main page for the 2018 conference X had the logo and boxes for each of the subpages according to the order the participants would need them. The boxes also included different visuals and colours from the logo to set an overall theme to the page. Each of the boxes was a button linking to the subpages, this way making the page clear and content easy to find. The colourful design made the page intriguing to viewers. Not all conference logos

have been this colourful, making the pages always look different. This design especially has received positive feedback from participants and other employees who have visited the page.

It is crucial that all information is divided into sections or subpages, that will make it easier to find certain details. Registration should be one of the first subpages that can be easily accessed, for every attendee needs to fill out a registration form for the conference. The registration page will house the link to the registration form created on SharePoint. This registration form is responsible for gathering all the needed information from the participants for booking accommodation, special requests, allergies and parking needs. Find more on creating registration forms on the registration section of this thesis. The registration subpage includes all arrival and departure information as well as expensing information. This is related to the conference budget and defines how employees expense their conference travel costs back to the company. The page is divided into sections to categorize content. The main sections include the conference start and end time, onsite registration hours and the conference dress code.

Another set of information that should be divided into its own subpage is accommodation and travel. This page informs the participants where they can book their transportation and includes maps as well as instructions on locating the conference centre or hotel. This page is important for participants when they need to know more about the hotel, travel possibilities and meals provided etc. The page is divided into five sections including travel directions, arrival and departure dates, expensing instructions and codes, additional meeting information and accommodation and confirmation details.

The conference X news page houses all the preconference communication that needs to be communicated to the participants. This is also where volunteer registration information is posted. During the conference, this page will include different interviews or news posted from the participants or speakers. The communications lead will be responsible for updating this page according to the content they collect during the conference. This page can also be used to gather information pre conference. One of the main segments being peer-to-peer recognition. The conference wants to recognize and motivate hard workers and there are many recognition segments included throughout the conference. In order to organize this piece, the recognition lead will need to gather materials and names of employees who have done exceptional work throughout the year for recognition opportunities. The recognition lead publishes a news segment asking for employees to recognize and reveal their colleagues who achieve their hard work to be recognized in front of the company.

The learning materials page consists of all the documents that participants may need before or after they have participated in the conference sessions. This page will also house all information related to the different courses provided, for example links to the online courses for

those who could not participate in person. All client facing employees need to participate in certain sessions in the conference in order to gain the CE Credits that they need to acquire in a year. CE credits can be gathered by participating in different learning development events throughout the year, that company X arranges. It is important for financial consultants to gain these credits for they require a certain amount per year to keep their licence.

Volunteers are important to the operations during the conference. There are normally 10 volunteers chosen through an application process arranged by the planning committee volunteer

lead. These volunteers are given different tasks to assist the participants during the conference. The volunteer subpage is used to give the volunteers recognition and allot the participants to get to know the volunteers before the conference. The main goal is to choose volunteers from all the different regions and in multiple different roles. This page has also in previous years had important information for the volunteers.

Conference activities are different every year. The conference activity page has more information on the different team building or recognition opportunities offered throughout the conference. All the main activities are captured on this page, advertising and aiming to excite individuals to participating in each activity.

The conference agenda keeps the same format almost every year. The sessions change according to the conference purpose and theme. Since the agenda template does not change very much, it is easy to create the agenda for the conference. The main information required on the agenda is the conference dates, times, session names, speaker names, break information as well as conference rooms.

The agenda template is easy to read and use. This document is added to the conference Verve page as well as shared in the conference SharePoint site. The document design is professional and easy to alter if needed.

The photos page houses all the photos the professional photographer takes during the conference. This is important to include when creating the main page but will be blank until the conference starts. This allows people to collect some photos of great moments they might want to save.

The additional information page is the last page of the conference webpage. This section includes the delegate handbook with safety instructions and guidelines the participants might need information on before the conference. Here they can also find information on what they need to do pre- conference to be organised.

There are many things that can go wrong when designing the conference webpage. It is important to design the page from a user perspective, making it as easy as possible to navigate

through. The information on the page needs to be updated constantly and kept up to date. Otherwise this causes confusion to participants. The pages need to display all the needed information and the user experience needs to be easy. Participants shouldn't need to look long to find certain information. Visitors need to be able to find what they want.

A study conducted in 2003 by Kim et al. found that if visitors cannot find a certain item on a website, 50 per cent of them will leave. If they have a negative experience, 40 per cent will never return to the site. A way to avoid this would be to create content on the site that can be benchmarked.

#### 5.12 Creating the registration form

When running any type of event, the coordinator wants everything to run as smoothly as possible. Therefore, creating a perfect registration form can help ease the process. There are many things to consider before creating a registration form for an event. The main ones including food requirements, contact information, accommodation needs as well as any special requests. The main goal is to make the form as simple as possible so that participants will have no problems while inputting their information.

There are some basic tips that the registration specialist should know before starting the form creation. The first is to only ask what is needed, the main goal of the form should be to get as many registrants as possible. This is why the friction should be reduced, making the form as short as possible that participants don't need to spend a lot of time filling it out. The information that is most important to event operations should be the only sections included. The second tip would be to make sure people know what the information is being used for, especially when asking about sensitive subjects. Third, not every field needs to be mandatory, only the fields that have the most important information needed pre- conference. The fourth tip would be to add directions to more complex questions or ones that require free form text. It is important to also check the form across different devices, especially in a company like company X where employees use both company laptops and smartphones. The form should be made visually interesting increasing the number of registrants. Lastly, the form should be arranged in a logical manner. Make sure that no one is disoriented by the structure and that everything progresses in a logical manner.

The conference X registration form is created in the conference SharePoint site with the help of InfoPath. Having the registration form online, makes it easy to distribute and manage. InfoPath includes many features that can be used to create any kind of form designs.

The main questions included in the conference X registration form are divided into two sections. These two sections ensure the content is displayed in a logical manner. The first sec-

tion has all the basic participant details. The second section includes all details related to accommodation. All of the questions on the form are carefully selected and analysed according to conference needs. The form is to be made as short as possible, making it easy for participants to fill out.

The basic information section comes first on the form. First the participants fill in their name or choosing it from the company SharePoint employee directory. This feature makes sure the participant does not enter any false information accidentally. Next the participant enters their company email, role, allergies and preferred language of communication.

The accommodation section begins with short text informing participants on their booking information. This is followed by the participant choosing from a dropdown box if they will be requiring hotel accommodation or not. Then there is an arrival date and departure date section. This information is important for the rooming lists sent to the hotel before the conference. Lastly, there is an area where participants can tell about special lodging requests, parking requirements or even book a spot at a conference exercise class.

### 5.13 Marketing

The marketing section of conference X is executed by the company marketing team. They are responsible for making sure the conference is in sync with the company brand. One of the first tasks for the marketing team is to create the conference logo. The first meeting with the marketing team consists of going over the conference purpose and objectives, this will give the marketing lead an idea of what the logo could look like. This notes from this meeting are collected and forwarded over to the company creative team who start to work on the logo. Once the first draft is created, the marketing lead returns to the conference coordinators to pitch the first draft. This is then discussed and feedback is exchanged. The first draft is normally never the final version. The marketing coordinator gathers the feedback and communicates it to the creative team getting them to start their second draft. This continues until the conference coordinators have confirmed the logo and this is then forwarded to the company leadership team for confirmation. Since company X is a bilingual company, all materials created by the company, including logos, must be translated in English as well as French.

The next task is to develop the marketing milestones document. This will include every piece of content the marketing lead will need to provide to the conference coordinators. One piece of content that is very important to the conference learning section is the MS document template the marketing team is to create once the logo is defined. These documents are forwarded to every session speaker or presenter, who then provide all their content back to the conference planning committee.



The invitation email template is created by marketing to reflect the colours and design of the conference logo. The email will include the very basic information on the conference and a link to the registration form. This website has a link at the top of the page with a link to the registration form. The email is written as an invitation and is only sent to the individuals in the participant list.

All digital signage and printing jobs are designed by the marketing team. These include speaker cards, directional boards, attendee letters and other conference external communication templates. The main template that the marketing team will need to design together with the communications lead is the invitation email template. Marketing will design the template outlay with the logo and communication will gather the text. This is then forwarded to the registration lead, who adds a hyperlink from the email template to the registration form and sends it out to all participants.

Once the conference app vendor is contracted, the marketing team will need to design the attendee name tag templates, the app visuals and adjust any speaker photos according to the vendor guidelines. The marketing lead will send the creative team all the details on the app visuals and the creative team will design the colour, lights and outlay. These are then forwarded to the conference app vendor.

The freebie swag, sometimes also spelled schwag, dates back to the 1960s and was used to describe promotional items. According to our files, early swag was everything from promotional records sent to radio stations to free slippers for airline passengers. In short order, this particular meaning of swag broadened and soon referred to anything given to an attendee of an event (such as a conference) as a promotional stunt.

The conference coordinators and marketing team will together ideate different swag items for attendees, related to the conference theme. These items can vary from Amazon Echoes to books. It is important though that the item plays a purpose in the learning and overall conference experience. Once the items are chosen, the marketing team designs the item personalization and branding. They are also responsible for finding the cheapest vendor and placing the orders, so the item arrives on time for the conference.

Before the conference, it is important to make sure all the documentation, schedules and marketing print jobs are all accessible easily. Moving into a more sustainable and environmentally friendly era, the best possible way to make sure all the documentation is accessible would be to utilize an electronic devise. The device must be easily moved around for coordinating on-site requires lots of movement. Therefore, a tablet would be nowadays the best device for storage and tracking onsite activities. Marketing print jobs, for example all signage should be shipped to the conference location early enough for it to reach the hotel in time for the conference.

The planning committee should be provided with the technology to make the event environmentally friendly by not requiring materials to be printed out on paper. This would also ease the search for information and make sure no documentation is lost in the midst of the activity.

The shipment to the location must be sent in time with all possible materials needed. The conference lead and marketing will be responsible for packing all the supplies needed. Some of these include signage, office supplies, printers, name tags and printed documentation. These will be stored at the location upon arrival and moved to the correct location on the day of the event.

#### 5.14 Registration

The registration lead is responsible for keeping the conference participant lists updated. Their first task is to create and arrange the participant lists on Excel in a way that they are easily managed. The lists are normally filtered in alphabetical order according to the participants last name to make the sheets easy to search through. The different roles are divided into separate sheets as well for the same purpose. Once the list is confirmed by the company leadership team, the invitations are sent. This is also something that is managed by the registration specialist.

The invitation email does not need to be sent out in the same email to all the 600 participants. Instead many copies are created of the registration email template and they are sent out according to role. Before the email is sent out the registration specialist needs to make sure the link in the email is working, the subject line is accurate and all the content in the email is available in English and French. The invites will then be recorded in the participant list, so if new participants are added, these can be easily added and are not confused with others. The registration email template will then be sent separately to these individuals. Once the participants have received their invites, they are given two weeks to register. After this, those who have not registered will need to be determined by comparing the participant list to the SharePoint registration list. These late registrants will then be sent a reminder email.

The registration reminder emails will be sent out to those who have not yet registered two weeks after registration has been sent out. There are normally around 100 participants who have not registered by this time. The reminder email is very similar to the invitation email. The content on the email is normally changed but the design is kept the same. The content on the reminder email consists of a short text with a reminder for participants to register by a certain date as well as a reminder for them to book travel early. The content is not as formal

as the primary invitation letter. Participants are then given a week to participate before registration ends. Now the last few participants are contacted personally with Skype to remind them to register.

Once all the registration information has been received the information from SharePoint will need to be input into the Excel sheets to determine the participant billing instructions. The billing instructions and bookings are sent to the hotel a month before the conference starts. After this only the individual changes are communicated with the hotel.

The individual in this role is mainly maintaining the conference email on Outlook. They are responsible for answering participant questions and assisting individuals through the registration process.

When all registration data is collected, this information will need to be reviewed. For large events, such as conference X, it is crucial that billing is marked correctly. Therefore, when reviewing the registration information, it is important to note the dates selected by participants. Extended stays and inaccurate dates need to be noted so that room rates can be informed or corrections made. The participant will be contacted, dates confirmed and room rate clarified for personal nights. All participants that are staying personal nights will be responsible for paying the extra nights upon arrival and therefore it is important to ensure the participant knows the dates the conference budget will cover.

Participant special rooming requests need to be included in the rooming list that is given to the hotel. These can include allergies or any special wishes for example, floor preferences, non-smoke room requirements, etc. Any special needs will need to be flagged as well, especially if it is anything needing immediate attention or may cause issues on site.

Allergies will need to be recorded on a separate list and sent to the catering provider. The catering company will then provide alternative options for allergies on top of the Banquet Event Order (BEO) menu supplied by the logistics lead. The participants are then responsible for identifying themselves on site.

The process to cross reference the SharePoint and Excel participant and rooming lists is a very manual process. The registration specialist needs to take a lot of time to determine who has registered and who has not, for the two lists are on separate programs. Out of 600 participants normally at least 100 have not completed registration after two weeks. The process could be made easier if a program was available that includes all features found on Excel and SharePoint.

For conference X, participants do not book their own accommodation, instead the accommodation will be booked for them according to the dates they select on their registration form.

This information is then gathered to form a rooming list. The rooming list will be sent to the hotel according to the date stated in the milestones document. This is normally 3 weeks before the conference starts. This rooming list will be gathered from all the participants who have registered and chosen that they need accommodation for the duration of the conference. The registration lead will gather all the participant information together into a document called the rooming list. This document will include the participant's first and last name, email, arrival and departure date, special lodging requests and billing instructions. All this information has been gathered through the conference registration form. Once the first version of the document has been sent to the hotel, the hotel will confirm the bedroom count and send a rooming document. The registration lead needs to confirm the billing information has been input correctly and make sure to inform the hotel on any changes that may occur after this list is sent, if a participant for example wishes to change their departure date. If billing information is not input correctly, this may cause problems for the conference budget. The conference budget only covers hotel nights the participants are staying for meetings. Any personal nights for vacation etc. will not be covered under the conference budget. This means the individual will pay for these nights upon check-in at the hotel. The hotel will need to be aware of all personal nights for the correct payment to be collected.

Changes in registration information is hard to track, for these changes must be made on the participant list, SharePoint registration platform and on the rooming list. It is easy to make mistakes when the information needs to be changed in so many places. It would be easier if there was a joint platform for these different lists. The process to make changes is very manual. The changes need to also be recorded in another location, or marked in another colour if the registration specialist doesn't send every change individually to the hotel. It is suggested to record all the changes during a week or a few days and send them together to the hotel. Otherwise the hotel will constantly receive emails with changes to participant information.

#### 5.15 Volunteers

The Volunteer lead is responsible for defining the 10 conference volunteers. The process to find the suitable volunteers starts with a news segment going out to all employees through the ME Weekly News as well as the conference website. The message within this news segment will be drafted together with the communications lead and translated to be bilingual. This message will include the volunteer lead's contact information, where the interested individuals can send their personal information. The individual suitability is then analyzed with an interview scheduled by the volunteer lead. All the interested employees will be interviewed and their interviews recorded for the lead to be able to analyze the best suitable fit. Once the 10 volunteers have been decided, the lead will send out acceptance and decline emails to all individuals. The 10 chosen will receive acceptance emails as well as formal conference in-

vites, where they can register. The email must include detailed arrival and departure information. Other information that should be included is expensing guidelines, dress code, hotel details etc.

All volunteers are ordered conference themed clothing. This is designed together with the marketing team and conference coordinators. The most usual conference clothing ordered for the AAC includes a basic t-shirt with the conference logo. According to the conference budget the coordinators can decide on different types of clothing. Each volunteer is ordered enough pieces of clothing that they can wear a different piece every day of the conference. This is important for hygienic purposes. Since the volunteers can be men and women, the clothing needs to be unisex.

When the conference coordinators have decided on the suitable style, colours and design, the marketing lead is to find the most suitable vendor. The marketing lead finds different vendors that could provide the design and negotiates prices. The coordinators look for the vendor with the lowest price, so once the marketing lead has the proposal set they forward this to the coordinators for final approval.

The volunteer lead together with the conference coordinators then send each volunteer a sizing chart provided by the chosen vendor along with other options, if available. The volunteers send back their sizes, colour, design, etc, which are then forwarded to the marketing lead who places the order.

The volunteers do not play a large role in the planning process. They are divided tasks on-site but before the conference to conference coordinator organises at least two volunteer meetings. The first meeting is arranged by the conference coordinator and includes only volunteers. This is an information exchange meeting, where the volunteers are introduced to the main conference theme and agenda. All volunteer tasks are defined and thoroughly described.

The next meeting with the volunteers and most of the planning committee is arranged in the form of a volunteer appreciation dinner the day before the conference. The conference coordinator is responsible for finding and booking a venue as well as preparing a menu for the group taking into consideration all participant allergies. This is where the volunteers and planning committee will exchange all knowledge on the conference flow and what to expect from the experience. Each volunteer will be given a role, tasks and guidelines for each conference day. The volunteers will be informed on all risks and be given emergency instructions. It is important that the whole group knows their responsibilities during the conference to ensure no problems arise.

### 5.16 Event Kick Off

The first task once arriving at the location is arranging all the supplies and documentation. This will allow for the coordinators to track if anything is missing or has not yet arrived. The materials should be marked with the conference information as well as the content so that they can be more easily arranged. All signage is to be moved to their location and digital signage is to be tested.

All volunteers are to prep any additional tasks that need to be completed. The coordinator must arrange meetings with the volunteers and volunteer lead to inform of the day flow and all tasks needing to be completed. Then the volunteer lead can take over to manage the timing and execution of all tasks.

Once everything is set up, the team goes through all event rooms to make sure that the room set-up and AV meet the conference requirements defined by each speaker separately. If something is missing or needs to be changed, the coordinator contacts the on-call contact at the location to give instructions and forward special requests.

The registration desk is set up by the coordinator and the volunteer team. The volunteer team will be manning the registration throughout the conference. Once everything is set up and all supplies have been transferred over, the coordinator preps the volunteers by training them to execute the registration process. The registration desk is where all participants can go for more information on the conference as well as pick up any supplies they may need.

Breaks and meal rooms are checked at the same time as the planning committee looks through all session rooms. At the beginning of each break or meal, the coordinator checks that everything that was ordered from catering is provided. If anything needs to be added or is missing, the coordinator contacts the catering contact. Meal and break times are defined in the schedule and communicated to the catering company so that everything is all set-up before the meal/break starts. All participants with special dietary needs are to identify themselves to the catering staff so that they can arrange compensatory meals. All products and foods are to be labelled correctly to prevent participants from eating anything they cannot. The coordinator must check that these are available and correctly labeled.

### 5.17 Participant Satisfaction Survey

The survey is built at latest 2 weeks before the conference starts using the company's survey platform. The survey allows for the planning team and leadership to evaluate the overall experience. According to the results, the planning committee can arrange improvement and development ideas for future conferences.

Some of the main areas evaluated include the networking opportunities, learning opportunities, connectedness to the company, recognition, facilities and expectations. The survey also allows for participants to add suggestions for future conferences. The networking, learning, connectedness and recognition are evaluated with a scale from “Very well achieved” to “Not achieved”. The conference facilities are evaluated on a scale from “Excellent experience” to “Poor experience”. The expectations are evaluated on a scale from “Better than expected” to “Worse than expected”.

In addition to the main evaluation areas, all sessions and speakers will be evaluated according to the material usefulness to the individual participants role. Participants will also have the possibility to add comments on all the sessions. This way the planning committee can build an understanding on relevant speakers and those that trigger a negative impression on the participants. The information gathered through the survey can then be used in the post conference planning committee meeting, where “lessons learned” are discussed. This meeting is normally scheduled a month after the conference has ended, giving the conference lead time to analyse the survey results and create infographics.

## 6 Survey results 2014 - 2018

The survey results gathered are used to define the participant satisfaction for different years. Correlation analysis was used to test relationships between the different variables found from 2014 to 2018. The author chose this analysis method to define relationships between the different years, locations, and satisfaction levels. This would allow for the variables to be tested to define whether full participant satisfaction was reached and what variables could have affected the results. The main hypothesis being tested is that participants are not fully satisfied in the different areas of the conference. This will allow an understanding of the areas with the lowest satisfaction results and those with the highest satisfaction results. The 0 hypothesis therefore is that the participants are fully satisfied in the different areas of the conference. Participants are fully satisfied if the results show 100% choosing ‘Achieved’ or ‘Great Experience’. If the hypothesis is correct, this will confirm that there are pain points within the conference planning process that require improvement. Hypothesis have been tested by gathering and comparing conference X Survey results from 2014 to 2018. Survey results are gathered every year from conference X and results can be used to improve the experience in future years. The total number of respondents alter from year to year. This is due to the difference in participants. In 2014, the survey received the lowest respondent amount of 247 people. In 2015 and 2016, the respondent amount was nearly the same at 307 to 310 people. The highest respondent rate however was received in 2018 with 346 respondents. This may be due to the satisfaction levels being high and people wishing to input feedback on the conference. Another reason could be that participants had more time in their schedule to fill out

the survey. The participant amounts have also been growing from year to year, impacting the amount of people requested to take the survey post conference.

Total number of respondents			
2014	2015	2016	2018
247	307	310	346

Figure 8 Total number of respondents (2014-2018)

The first section of the survey analysed the overall achievement of the learning, networking, building the company culture and recognition pieces of the conference. The conference X being a professional development event, the learning piece is extremely important. All participants are expected to have gained new knowledge and skills from the conference. These they can then input into their daily practice and client relationships.

	Learning			
YEAR	2014	2015	2016	2018
Achieved	229 (93%)	249 (81%)	255 (82%)	<b>298 (86%)</b>
Somewhat achieved	18 (7%)	49 (16%)	46 (15%)	<b>38 (11%)</b>
Not achieved	0 (0%)	9 (3%)	9 (3%)	<b>10 (3%)</b>

Figure 9 Learning survey results (2014-2018)

According to the survey results, the highest learning was achieved in 2014 with a 'Achieved' percentage of 93%. This means that there was only a 7% need of improvement. The percentage for 'Not achieved' was at its lowest in 2014 at 0% as well as the 'Somewhat achieved' with 7%. This means that there were only 18 people or 7% who would like more learning opportunities at the conference of 2014. The learning achievement is still not at its fullest 100%, meaning the hypothesis is accurate. The second highest learning results were achieved in 2018 with 298 or 86% feeling the learning was achieved. There however was an average of 10 people (3%) who felt that the learning segment was not achieved in 2018. To reach the full 100% achievement, these 3% would need to be concentrated on first. Getting participants from somewhat achieved in learning to achieved is less difficult than getting participants from learning not achieved to learning achieved. The learning has now been at 3% not



achieved now for 3 years, in 2015, 2016 and 2018. The results for learning achieved have improved 1% between 2015 and 2016. Between 2016 and 2018 the results for achieved improved by 4%. The difference to achieve 100% achievement from learning in 2018 is still 14% so there is still much to improve. It can be concluded that there is still much to improve in learning, for the conference learning has not been 100% achieved from 2014-2018.

To better transfer learning and key messages over to an audience, it is important the experience portrays all or at least most of the learning transfer factors defined in the table below. These are factors that can assist to build learning content in a way that is easily transferred. If the content meets all the factors, it'll prove to produce the most value and beneficial knowledge. These factors play a large role both before and after the event. Before the event, the assessment of the participants' learning needs, how these might be met and how it could be used are critical to generate the motivation to learn. After the event, the participants role as a coach, as one who can support and generate new ideas, give honest and clear feedback as well as the confidence to take on new challenges is crucial to generate the motivation to transfer. (Kirwan, C. 2016)

Learning transfer factor	Questions to consider
Motivation to learn	Why were you interested in this programme? What were your expectations from it?
Training content and design	Was the content relevant to your own job and your training needs? Were there aspects of the programme you found particularly helpful or unhelpful? Did the way in which the programme was delivered make it easier or harder for you to apply what you learned? How does the programme compare with best practice?
Motivation to transfer	How keen or otherwise were you to apply what you learned on your return to work? Did you think that applying the new skills would benefit you?
Personal ability to transfer	How easy or difficult was it to find time and space to put your new learning into practice? What helped or hindered you in this respect?
Manager support and coaching	How helpful or otherwise was your boss with regard to putting what you learned into practice? What did they do or not do?
Peer support	How supportive were your peers, either while you were on the programme or when you came back?
Organizational climate for transfer	How open or otherwise is your work environment to change? How difficult or otherwise is it to get new things done?
Learning outcomes	Did you learn anything you didn't expect to, such as about yourself or your role?

Figure 10 Learning transfer factors (Kirwan, C. 2016)

The learning segment can be improved by having more experienced speakers with subjects related to participant specific fields. By developing the learning opportunities, the conference will add more value and knowledge to all client facing employees. Other ways to improve learning at the conference is to add role specific workshops where best practices and new trends can be discussed. By include Q&A time in the beginning of the sessions, the participants can influence the topic of the session and level of understanding. (Kirwan, C. 2016)

	Networking			
YEAR	2014	2015	2016	2018
Achieved	220 (89%)	264 (86%)	254 (82%)	<b>297 (86%)</b>
Somewhat achieved	25 (10%)	40 (13%)	56 (18%)	<b>45 (13%)</b>
Not achieved	2 (1%)	3 (1%)	0 (0%)	<b>4 (1%)</b>

Figure 11 Networking survey results (2014-2018)

The networking segment has the highest achievement percentage in 2014 with 89% of participants feeling the networking had been achieved. There is however still over 11% difference for the results to be 100% achieved. This confirms that the hypothesis is correct and there is still areas to be improved in the conference planning process. The results in 2014 were 4% higher than in 2018. Both 2014 and 2018 had a percentage of 1% who chose 'Not achieved'. To bring the achievement up to 100%, the 'Not achieved' results need to be concentrated on. It is better for participants to feel the networking was somewhat achieved than feeling it was not achieved at all. The conference held in 2015 had 4% higher achievement results than the one in 2016. However, 2016 was the only year when 0% of participants felt networking was 'Not achieved'. There is still improvement to be done on networking at the conference, for the results show that networking has not been 100% achieved from 2014 to 2018.

The networking opportunities can be improved for 2019 by adding more time for connecting or including some team building activities. Providing employees with possibilities to network will impact their performance positively by nurturing the human kinds need for connectedness. The organization will feel more like a family and employees will take on the company values as their own when working to drive their every decision. Organizations showing they care for their employees and proving to always be there for them, providing support, understanding and offering development opportunities, will build the company connectedness. This

effort and value of nurturing relationships will then pass on to employees facing clients. Client facing employees can then build stronger relationships to clients. (Schiefelbein, J. 2017)

	Building the Company Culture			
YEAR	2014	2015	2016	2018
Achieved	235 (95%)	276 (90%)	267 (86%)	<b>308 (89%)</b>
Somewhat achieved	12 (5%)	25 (8%)	37 (12%)	<b>35 (10%)</b>
Not achieved	0 (0%)	6 (2%)	6 (2%)	<b>3 (1%)</b>

Figure 12 Building the Company Culture survey results (2014-2018)

Building the company culture is directly related to the company values, connectedness and networking. This means it is the way employees see the company, treat one another as well as treat their clients. By building a connected culture all employees feel as if they are part of one big team aiming for a joint objective. The best results in building the company culture were achieved in 2014 with 95% achievement. There is still a 5% difference to achieve the full 100%, meaning the hypothesis is correct. The 2018 conference rated 6% below the 2014 conference. The second-best results were achieved in 2015 with 90% achieved. There is still a 10% need for improvement to achieve 100%. There was 1% who believed the conference in 2018 did not achieve in building the company culture. In 2014 however, 0% chose that the conference had not achieved to build the company culture and only 5% chose somewhat achieved. This means that in the end of the 2014 conference, everyone left feeling more connected to the company as well as each other. In 2015 and 2016, there were up to 2% who felt the conference had not achieved to build the company culture. To increase the achieved results, the 'Not achieved' results need to be improved. According to the results, the conference has not yet reached 100% achievement on building the company culture, which means that there are still areas to be improved.

Culture is the bedrock of business success. Business culture is built from values, norms, behaviors, language, beliefs and systems. The success of the company culture can be defined in seven pillars of cultural success, including transparency, positivity, measurement, acknowledgement, uniqueness, listening and mistakes. Evaluating and fostering the company culture should be an ongoing effort. To better improve transparency, the wide flow of communication within the company would need to be improved. This can be either simple employee feedback

or sharing profit and loss statements. Positivity can be improved by proving solutions to problems. Efficient problem solving will allow employees to gain rather than lose ground on setbacks. Therefore, best ways to improve positivity is by providing employees opportunities to bring forth problems in their teams and provide solutions when needed. Measurement is important to determine how the company is doing. Analyzing profit and loss statements, employee engagement, customer satisfaction and objective achievement could reveal areas requiring development. For conference X, the post conference survey allows for the collection of data that can then be used to develop the event. Acknowledgement is the way the company recognizes and rewards exceptional work. The act of acknowledgement can be a great way to motivate employees and drive results. The ability to recognize and appreciate uniqueness is a great talent. The unique aspects of the company distinguish its brand. Fostering active, result based listening can assist the company to rise above its competition. This will help to build a culture where clients feel valued and employees feel more connected. Viewing mistakes or poor outcomes as learning experiences instead of weaknesses to be punished, encourages innovation and mutual respect. (Dyer, C. 2018)

	Recognition			
YEAR	2014	2015	2016	2018
Achieved	200 (81%)	224 (73%)	223 (72%)	<b>277 (80%)</b>
Somewhat achieved	37 (15%)	74 (24%)	81 (26%)	<b>59 (17%)</b>
Not achieved	10 (4%)	9 (3%)	6 (2%)	<b>10 (3%)</b>

Figure 13 Recognition survey results (2014-2018)

Recognition is an efficient way to motivate employees. The company has arranged different types of recognition to its employees throughout the years and it has been a significant part of the company culture. The recognition during the conference is normally arranged during lunch or dinner. There is also digital recognition designed to be displayed throughout the conference. The recognition piece has the lowest achievement survey results with an average achievement value of 76.5%. This means that it would require over 23% more results to achieve a 100% achievement of recognition. Learning, networking and building the company culture require less improvement than recognition. The average achievement of learning is 85.5%, requiring improvement of 14.5% to reach the 100% achievement. Networking has an average of 85.75% achieved, requiring 14.25% to reach 100%. Building the company culture has an average achievement amount of 90%, requiring only 10% improvement to reach 100%. The

results show that 10% is the minimum improvement still needed to reach 100% achieved. This means that the hypothesis is correct and the conference planning process still needs to be improved.

The highest achievement of recognition was achieved in 2014 with 81%. This still leaves a 9% need for improvement to reach the 100%. The conference in 2018 received the second highest achievement results with 80%, only 1% below the 2014 results. Recognition throughout the years has the highest levels of participants who feel that it is not achieved. In 2014, there was up to 10 people (4%) feeling recognition had not been achieved. The main factor dropping the recognition average is the drop in achievement values in 2015 and 2016, when the numbers dropped to below 80%. There was a very high amount of people feeling recognition was only somewhat achieved in those years. However, there was only 2% of participants choosing 'Not achieved' in 2016. The results for recognition from 2014-2018 have not been achieved 100%, meaning there is still improvement to be done. This means the hypothesis is accurate.

Many companies think that money is the best motivator. This is however false, money is of course important, but financially rewarding people is more of a de-motivator. Recognition is an important part of employee satisfaction. This requires lots of active involvement from the organizational management. Recognition is comprised of two elements, rewards and recognition. The reward can be an experience, small prize or cash, but giving out small recognition rewards is often more effective than giving out one large one. The main part of the recognition is being openly thanked in front of peers or colleagues. This motivates other at the same time to do well to receive the same recognition. (Papes, R. 2014)

2014	The Westin, Ottawa
2015	The Westin Harbour Castle, Toronto
2016	The Westin, Ottawa
2018	The Fairmont Queen Elizabeth, Montreal

Figure 14 Conference X locations (2014-2018)

The next tables show the satisfaction results for quality of the meeting facilities and the food quality. When analyzing the tables, it is important to know where the conference has taken place in the years 2014, 2015, 2016 and 2018. The table, conference X locations (2014-2018), shows the locations where the conferences have been held from 2014 to 2018. The 2014 and 2016 conference was held in Ottawa, at the Westin Hotel. The 2015 conference was held in Toronto at The Westin Harbour Castle Hotel. Lastly, the 2018 conference was held in Montreal at the Fairmont Queen Elizabeth.

	Quality of the meeting facility			
	2014	2015	2016	2018
Great experience	235 (95%)	298 (97%)	279 (90%)	329 (95%)
Fair experience	12 (5%)	9 (3%)	25 (8%)	14 (4%)
Poor experience	0 (0%)	0 (0%)	6 (2%)	3 (1%)

Figure 15 Quality of meeting facilities survey results (2014-2018)

According to the survey results, participants were most satisfied with the quality of the meeting facilities in 2015 with 97% having a great experience. This means that there is only 3% required to reach 100% achievement. The average quality of the meeting facilities was 94.25% with great experience, so only requiring 5.75% improvement to reach 100%. This however does prove the hypothesis to be accurate for there is still a small amount of improvement required. The results in 2014 and 2018 were similar with 95% having a great experience, yet 2014 had a 1% higher rate of participants having a fair experience. There was up to 2% of participants who felt the quality of the meeting facilities was poor in 2016 and again 1% in 2018. Since the same meeting facilities were used in 2014 and 2016 and the satisfaction level drastically dropped between the two years with 5%, it can be concluded that the large increase in participant amounts may have been the cause. The meeting facilities may have been too small for the group in 2016.

	Quality of the food			
	2014	2015	2016	2018
Great experience	222 (90%)	273 (89%)	276 (89%)	229 (66%)
Fair experience	15 (6%)	28 (9%)	28 (9%)	69 (20%)
Poor experience	10 (4%)	6 (2%)	6 (2%)	48 (14%)

Figure 16 Quality of the food survey results (2014-2018)

The food for the conference is normally provided by the meeting facility's internal catering services. The quality of the food has varied from year to year and it can be concluded that participants were the most satisfied in the food quality in 2014. The results in 2014 have 90% with a great experience, requiring still 10% to achieve 100%. The results in 2015 and 2016 were identical, even though the catering provider changed. The results in 2015 and 2016 were

1% below the 2014 results for great experience but 2% lower with poor experience than 2014. The worst results were in 2018, with only 66% of participants feeling the food quality was great and up to 14% feeling the quality was poor. The 2018 results dropped the average great experience number to 83.5%, requiring improvements of 16.5% to reach 100%. This means that there are still areas to improve in food quality and therefore the hypothesis is accurate.

It is important that participants feel they have received the correct amount of nutrition and therefore these results are important to develop the experience. Nowadays, the number of people with special dietary restrictions is higher than in 2014, making the designing of the banquet menu far more difficult. There needs to be alternative foods for those with restrictions easily accessible and all foods very specifically marked with all ingredients. This way any risks of allergic reactions can be avoided. It can be concluded from the results that the food and facility quality is dependent on the hotel/conference center and the catering company used. The results have never reached 100% satisfaction; therefore, these still need to be improved in the future.

<b>Expectations – The conference met my expectations:</b>				
YEAR	2014	2015	2016	2018
Better than expected	80%	39%	42%	72%
About the same as expected	19%	56%	55%	25%
Worse than expected	1%	5%	3%	3%

Figure 17 Survey results for participant expectations (2014-2018)

The last table features the survey results for the participant expectations. Each conference aims to exceed participant expectations. According to the results, there were 80% of participants who felt the 2014 conference exceeded their expectations. The 2014 percentage is the highest percentage to exceed expectations from 2014-2018, requiring 20% improvement to reach 100%. There was only 1% who felt the conference was worse than they expected. This means that the hypothesis is correct and there are still improvements to be made on conference expectations being met. In 2018, 72% felt the conference was better than expected and 3% felt it was worse than they expected. There was up to 5% of people in 2015 who felt the conference was worse than expected. The lowest value of participants feeling expectations were exceeded was in 2015 with only 39%. When a participant feels that the experience has

exceeded their expectations, the planning committee knows that they have successfully executed the event and that the aims and objectives were achieved. Since the results for expectations being exceeded have not been at the full 100%, it can be concluded that there are still some aspects within the process that need to be improved.

According to the results gathered from the conference X surveys from 2014-2018, there is still many areas requiring improvement in the process for it to be achieved (100%) and participant satisfaction to be exceeded. Therefore, the hypothesis is correct and there are still many pain points within the ME conference planning process that need to be improved. The main areas requiring lots of attention, improvement and ideation for 2019 include the food quality and recognition. This is due to the low overall average of participants being satisfied. Bringing new recognition pieces into the conference could improve the number of participants choosing 'Achieved'. The food quality can be improved by using highly rated catering companies and ensuring all foods are properly marked to avoid and risks with participant allergies.

## 7 Defining the main pain points

Before conducting interviews, the main pain points were defined. Methods for evaluating and managing the planning committee will need to be improved. Possible solutions for this may be to create a detailed communication or management plan. Skype has also proven to play a large role in the constant difficulty to communicate throughout the planning process. This could be improved by switching to another program with the same features, for example WebEx. Managing participant lists has also been very manual and has a high risk of making mistakes. Tracking changes on all the different lists is very difficult. Possible solutions for these two problems could be to utilize a participant management program or create a joint document template that would have all the lists joined together.

The interview questions are designed to collect improvement ideas for the pain points defined in the previous paragraph. The first 4 questions will allow for the author to gain some personal information regarding the individual's experience in the event industry. The author decided to build 8 themed questions that would allow for a theme analysis to be made providing solutions or improvement ideas for each pain point. The following questions will be asked during the interviews:

- I. How many years have you been a conference coordinator?
- II. Are the conferences internal or external?
- III. What are the main types of events you have planned?
- IV. What is the average participant number for an event you have planned?



- V. How big is the planning committee you normally work with?
- VI. What type of communication plan do you make with the planning committee?
- VII. What type of communication plan do you make with external vendors?
- VIII. How do you track/manage that tasks get done on time?
- IX. What program/programs do you mainly use to keep in touch with the planning committee members and external vendors?
- X. What different programs or methods do you use for managing participant lists?
- XI. Have these programs/methods made the process less manual?
- XII. How do you manage registration, rooming and allergy lists?
- XIII. Have you gathered satisfaction data from participants? What programs have you used?
- XIV. What have you noted to be the biggest pain point in the event industry?

## 8 Interview analysis

For this thesis, the author interviewed 7 people working in the event industry. The goal of the interviews was to gather possible improvement ideas for the main pain points the author found in the conference planning process. The author used applied thematic analysis to distinguish similarities and differences in the qualitative data. From the analysis results, the author could gather improvement suggestions. I used the themes defined in chapter 2.

Applied Thematic Analysis (ATA) is a type of inductive analysis of qualitative data. It can involve several analytic methods and be applied on in-depth interviews, transcripts from focus groups or even field observations. (Guest, G. 2011)

The author collected data from people who have been working in the event industry. All had experience from 3 to 26 years. There were differences between the types of events that each event planner coordinated. Most participants have done both internal as well as external events. External events were more common based on the data collected. The most common events types arranged for internal participants (employees within an organization) are professional development/learning events. Some of the most common external event types that are organized for clients are social events and seminars.

The participant amounts that each event planner organizes also alter according to the event type. The average participant numbers range from 20 to 4000 people. According to the data collected, internal events tend to have larger participant counts than external ones. The average size of the planning committees used for over 100-person events is 4 to 5 people. The smaller events have been organized by just the event coordinator.

Communication plans with the planning committee are arranged in the beginning of the planning process. The most common communication plan includes weekly or biweekly meetings arranged on Skype, phone calls or face to face. The kick-off meeting includes dividing tasks and defining important milestones/deadlines. In the first meeting the best method of communication is confirmed. The main differences between the event planners are the connection point timelines and preferred connection methods. Face to face meetings tended to be the best alternative in the pre- faces and end phases of the planning process. Each event planner had certain types of tools and programs available to them. Email has been used by all event planners as a main source of communication between the planning committee. Living documents, or online documents have proven to be the most effective way to transfer information and ensure the planning committee has access to all documentation/templates. Due to common technical issues with Skype among other programs, face to face meetings or phone calls have been favoured.

Most event planners had existing relationships with external vendors they utilize in their events. The first communication is similar to the one set for the planning committee, best methods are defined and milestones confirmed. Email tends to be the most common communication channel with external vendors. Other communication methods that have also been used are phone calls and face-to-face meetings. WebEx is another program like Skype that has been used more for external communication. The common issue that event planners face is the difficulty to define suitable communication plans with new external vendors. Other event planners have been able to avoid any problems by implementing very strict deadlines and pre-defined communication touchpoints.

Tracking that tasks get done is an important part of the event planners job. Many event planners use meetings to track the progress of tasks and utilize foldering or smart sheets to maintain milestones. This system should be a collective accessible to the whole planning committee. This way everything can be found in the same place. Many of the interview subjects used different programs like SharePoint or shared drives. The newest update to SharePoint is currently being uploaded by all company X employees, allowing for a new online experience with more features. SharePoint Online is a cloud-based service that helps organizations share and collaborate with colleagues, partners, and customers. With the SharePoint online, accessing internal sites, documents, and other information can be done from anywhere—at the office, at home, or from a mobile device. Microsoft Projects is another software that one of the

event planners used for tracking progress. It is a project management software product, developed and sold by Microsoft. The program can be used to assist a project manager in developing a plan, assigning tasks, tracking progress, managing budgets, and analysing workloads. All the experienced event planners have certain templates they use during the tracking phase. Having these online, accessible and modifiable by the whole planning committee would ensure all information is captured and none lost in the process.

Communications with the planning committee and external vendors can be a difficult to track if there are many portals used. All event planners utilize the basic methods like Skype calls, WebEx, Outlook, face to face meetings as well as phone calls. One of the company internal event planners believes that upgrading to SharePoint Office365 would ease document sharing, messaging and group chats. Currently with everything being done with different programs, O365 would allow for a joint site to be built. This would assist in tracking communication, so no information is missed. External event planners utilize more face to face meetings to recap all information is shared throughout the group. One of the external event planners also believed the upgrade to Smart Sheets assisted to make the process less manual.

The most basic programs that have been used to manage participant lists are SharePoint lists as well as Excel spreadsheets. All events are different and these programs have allowed for flexibility. One external event planner preferred Smartsheet due to it's vast number of features. Smartsheet can be used to assign tasks, track project progress, manage calendars, share documents and manage other information. Having all information and management in the same software has made the process less manual. Smartsheet however is a costly software requiring some investment. Therefore, most internal event planners prefer to use programs provided by the company. These same programs have been used to manage registration, allergy and rooming lists. SharePoint information can be exported as Excel, making it easy to send to external vendors when needed. Managing the information on Excel is the most common practice requiring a lot of manual work.

All event planners, internal as well as external, have gathered satisfaction data after their event. These have provided great feedback and information that could be used to develop practices. The company X internal event planners use an internal survey software when creating and distributing their satisfaction survey. External event planners have mostly utilized SurveyMonkey. SurveyMonkey is an online survey development cloud-based software that is currently the world's most popular free online survey tool. The company internal event planners mentioned moving to SurveyMonkey as well for it is easier to use and more flexible.

The biggest pain point in the event industry is different depending on who is asked. Some internal event planners believe the biggest problem is communication with external vendors and lack of consistent teams, causing practices to be changed constantly and deadlines being

pushed. Some external vendors have not provided services at a professional level, causing bad experiences. Many event planners feel most don't understand the efforts going into coordinating an event, leading to information not being provided by the deadlines. This makes it difficult to provide experiences that rise above expectations. According to the external event planners, the biggest pain points in the event industry are the lack of experienced employees, no existing universal language, no user-friendly systems available and no official process existing. There is no specific education for an event planner, making the number of event planners with the correct experience and qualifications hard to find. There is no existing universal language for event management or an official process to use when executing an event. This requires each event planner to create their own process and develop their process through mistakes learned and feedback. There are many project management softwares available, yet they don't hold all the different fields required for events. Event planners handle lots of different data which they need to be able to export easily and track. Therefore, a software with user-friendly data management qualities would be in great need in the event industry.

## 9 Conclusions

After gathering my results, it can be concluded that there are many pain points within the conference planning process. The quantitative data helped to prove that the participant satisfaction levels are not at 100%, meaning certain areas of the event need improvement. The study can be conducted again after many years to analyze if the improvement ideas helped to improve the participant satisfaction level. This means that the quantitative study can be transferred and utilized by other companies to define the main areas requiring improvement in their event planning process. The quantitative data cannot by itself provide improvement ideas, requiring for another study to be carried out.

The qualitative data I gathered is from 7 event planners. To gather an even broader amount of information, more subjects could have been analyzed. The results I received from my interviews were enough for me to gather some improvement ideas for each pain point I defined in the planning process. Gathering more results would help to increase the reliability of information. Interviewing more event planners would also allow for more improvement ideas to surface, for each event planner has their own process. I managed to get very detailed and high-quality information from those who have been in the event industry for a long period of time. The data gathered from those who had not been in the industry for very long may have been not as high-quality information for it takes a long time to perfect the process and stay constantly ahead of new developments.

The main pain points defined in the conference coordinating process include defining the most effective way to communicate with the planning committee as well as external vendors. Task management has also proven to be very manual and difficult to control with external vendors. The lack of efficient programs/softwares has caused the planning process to be very

manual and documentation to be very spread out. List management is also a main pain point, for all lists are managed with a variety of different. List have been managed manually, causing for more time and efforts to be used on something a program or system should be able to manage automatically. Conference X survey data has been gathered using an internal program with very limited features. The software is not easy to use and does not have all the appropriate features wished to be used on the conference survey.

The interviews conducted allowed me to gather some improvement ideas to the main pain points defined above. Communication is difficult in an environment where employees may be working from the office or from home. Effective communication is key to planning a successful event. Therefore, an efficient communication plan must be set up prior to starting the conference planning process. Since Skype and other programs can cause many interruptions between communication due to technical problems, other methods of communication should be used as well. The first meeting is the most important with milestones being set and tasks being divided, thus this meeting would be better set face-to-face to ensure no information is missed. This will also allow all participants of the planning committee to get to know one another, building a stronger team relationship. People are social beings, requiring connections to other people. These connections are more easily made when placed physically in the same room instead of online, where only a voice recognition is made. A good balance between face-to-face and online meetings should be designed to achieve the most effective communication. Arranging a face-to-face meeting with the planning committee even once a month would allow for the relationships between one another to stay strong and assist the conference lead to manage that tasks get gone on time more effectively. This would allow for all other weekly meetings to stay online. In the end phases of the planning process it would be useful to bring the planning committee together face-to-face more often to speed up the pace at which last minute decisions get made. This will save time and decrease stress that tends to gather up in the last months before the event kick-off.

The easiest way to ensure tasks are managed and communication is efficient with external vendors is to define strict deadlines prior to the first meeting. Meeting with the vendor face-to-face would be the best way to make sure there are no confusions and to build a better relationship to the vendor from the start. Strict communication times are to be set to ensure there are no discrepancies on touchpoint expectations and information transfers or decision making is executed rapidly. WebEx has been used more often with external vendors, when requiring presentations. There are of course the same risks as with Skype but there is a more versatile set of features available with WebEx. Skype focuses on video conferencing; other than video and audio calls, you can screen-share during calls if you need to show something to other callers. WebEx on the other hand offers other features including a whiteboard, desktop and document sharing, applications and even a remote-control option. Therefore, it has been more favorable when communicating with vendors.

Tracking that tasks get done should be linked to the communication plan. These two areas should be available on the same platform. Company X is currently undergoing updates to launch the new SharePoint O365 to employees. This will provide a solution to some of the features lacking in the old SharePoint version and bring forth new opportunities for the events teams. In addition to document sharing, the new online version will allow for a space to be created for an individual event that can hold live chats, task management and live documents. The live messaging can be a sure way that all communication is captured and archived. No information can be lost, providing more effective and fast communication than on Skype instant messenger. Everyone with access to the space can create new tasks in the task page to be viewed by all users and provide live updates when certain tasks have been completed. This will allow for a live milestones document to be constantly accessible to everyone in the planning committee, ensuring there are no discrepancies on deadlines. The conference lead can keep an eye on the progress of tasks getting done and send reminders out if a deadline is reaching its end. The live document feature will ensure that everyone can make updates to all event documentation without other information being lost. There is no exporting and importing required when updating the documents, so there'll be no multiple versions of one document circling.

The live document sharing feature on the SharePoint O365 will make managing lists less manual as well. All lists can be housed in the same area and everyone will have access to the information who needs it. All lists can be in one live Excel file on the event SharePoint space and no updates will be lost, ensuring all data is correct. All lists; participant, rooming and allergy can be found in one Excel online file on separate sheets.

To improve and ease conference survey creation, the survey should be created with SurveyMonkey. Survey monkey has proven to be the easiest and most popular among event planners and includes features the conference lead wishes to implement in future conference surveys. The cloud-based survey software would allow for live result to be gathered and exported in different formats that the internal survey software has not been providing. The software is easy and fast to use, allowing for less time to be spent on creating the conference survey. SurveyMonkey allows for multilingual surveys to be created, but the translations do still need to be provided by the user.

All the improvement ideas defined above are cost efficient and easy to implement. They would not require any purchases to be made and could be taken into use by the 2019 conference X. This conference could then be used to test the affect these improvement ideas would have on the conference planning process. The quantitative research could then be implemented again to define the effect these improvements would have on participant satisfaction.

The event industry changes constantly and without a standardized practice, it's timely for new event planners to develop their practices to an efficient state. The conference planning process defined in this thesis and the research results found could be used by any event planner and implemented to plan an event of any size. The event industry playing such a vital role in a company's development opportunities, developing the process and standardizing it throughout the company is crucial to fulfill all its requirements to succeed. There may be other approaches to improve the planning process. Therefore, further research can always be implemented to find new discoveries to improving the conference coordination process.

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#### Appendix 1: Survey Questions

1. Rate how well you feel learning was achieved at the conference (1 being Achieved and 3 being Not achieved)
2. Rate how well you feel networking was achieved at the conference (1 being Achieved and 3 being Not achieved)
3. Rate how well you feel building the company culture was achieved at the conference (1 being Achieved and 3 being Not achieved)
4. Rate how well you feel recognition was achieved at the conference (1 being Achieved and 3 being Not achieved)
5. Rate your experience with the quality of the meeting facilities at the conference (1 being Great experience and 3 being Poor experience)
6. Rate your experience with the quality of the food at the conference (1 being Great experience and 3 being Poor experience)
7. How well did the conference meet your expectations (1 being Better than expected and 3 being Worse than expected)?

## Appendix 2: Interview Questions

- I. How many years have you been a conference coordinator?
- II. Are the conferences internal or external?
- III. What is the average participant number?
- IV. How big is the planning committee you normally work with?
- V. What type of communication plan do you make with the planning committee?
- VI. What type of communication plan do you make with external vendors?
- VII. How do you track/manage that tasks get done on time? Rat
- VIII. What program/programs do you mainly use to keep in touch with the planning committee members and external vendors?
- IX. What different programs or methods do you use for managing participant lists?
- X. Have these programs/methods made the process less manual?
- XI. How do you manage registration, rooming and allergy lists?
- XII. Have you gathered satisfaction data from participants? Satisfaction level?